Quest ActiveRoles Server

User's Guide

Version 5.2

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Quest ActiveRoles Server
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About This Guide

Overview

This document has been prepared to assist you with becoming familiar with Quest ActiveRoles Server. The Quest ActiveRoles Server User’s Guide contains the information required to configure and use ActiveRoles Server. It is intended for network administrators, consultants, analysts, and any other IT professionals using the product.

Conventions

In order to help you get the most out of this guide, we have used specific formatting conventions. These conventions apply to procedures, icons, keystrokes and cross-references.

ELEMENT	**CONVENTION**
Select	This word refers to actions such as choosing or highlighting various interface elements, such as files and radio buttons.
Bolded text	Interface elements that appear in Quest products, such as menus and commands.
Italic text	Used for comments.
Bold Italic text	Introduces a series of procedures.
Blue text	Indicates a cross-reference. When viewed in Adobe® Acrobat®, this format can be used as a hyperlink.
	Used to highlight additional information pertinent to the process being described.
	Used to provide Best Practice information. A best practice details the recommended course of action for the best result.
	Used to highlight processes that should be performed with care.
+	A plus sign between two keystrokes means that you must press them at the same time.
|	A pipe sign between elements means that you must select the elements in that particular sequence.

About Quest Windows Management

Quest Software, Microsoft's 2004 Global Independent Software Vendor Partner of the Year, provides solutions that simplify, automate and secure Active Directory, Exchange and Windows environments. The Quest Windows Management group delivers comprehensive capabilities for secure Windows management and migration. For more information on Quest Software's Windows Management group, please visit www.quest.com/microsoft.

About Quest Software, Inc.

Quest Software, Inc. provides software to simplify IT management for 18,000 customers worldwide, including 75 percent of the Fortune 500. Quest products for application, database and Windows management help customers develop, deploy, manage, and maintain the IT enterprise without expensive downtime or business interruption. Headquartered in Irvine, Calif., Quest Software can be found in offices around the globe and at www.quest.com.

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Contacting Customer Support

Quest Software's world-class support team is dedicated to ensuring successful product installation and use for all Quest Software solutions.

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Email at	support@quest.com.

You can use SupportLink to do the following:

- Create, update, or view support requests
- Search the knowledge base
- Access FAQs
- Download patches

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Introduction

- Preface

Preface

Improving network security, control, and manageability are constant challenges for the administrative staff of enterprise networks. ActiveRoles Server addresses these challenges, providing a comprehensive solution that improves security, reduces the cost of system and network administration, and increases the productivity of network administrators and help-desk operators.

ActiveRoles Server increases the productivity of system administrators and help-desk operators by automating repetitive provisioning tasks such as the creation of home folders and home shares, and the maintenance of group membership lists. The policy enforcement featured in the product guarantees that every administrative action taken is consistent with corporate security standards, which is a top priority for most organizations. The secure, policy-based, distributed administration model implemented with ActiveRoles Server provides time and resource savings, and dramatically reduces system maintenance.

The ActiveRoles Server User's Guide (End-user Edition) is designed for individuals responsible for performing administrative tasks within ActiveRoles Server's administrative structure. This document provides information about the ActiveRoles Server user interface, and includes instructions to help delegated administrators and help-desk operators perform day-to-day administrative activities.

The ActiveRoles Server User's Guide is supplemented with the ActiveRoles Server User's Guide (Administrator Edition) that provides conceptual information about the product, and includes systematic instructions on how to deploy the ActiveRoles Server administrative structure.

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Getting Started

- Starting the ActiveRoles Server MMC Interface
- Getting and Using Help
- Interface Overview
- Managed Units
- Filter Options
- Find Objects
- Policy Information

Starting the ActiveRoles Server MMC Interface

To start the ActiveRoles Server MMC Interface (ActiveRoles Server snap-in), select **Start | Programs | Quest Software | ActiveRoles Server**, and then click **ActiveRoles Server Console**.

Normally, the ActiveRoles Server snap-in automatically chooses the Administration Service and establishes a connection. If the ActiveRoles Server snap-in fails to connect to the Administration Service or you want to manually select the Administration Service, consult your system administrator. Information on how to choose the Administration Service can be found in the 'Administration Service Configuration' section in the ActiveRoles Server Administrator's Guide.

Getting and Using Help

ActiveRoles Server Help explains concepts and includes instructions for performing tasks with the product.

To get assistance while you work

- The **Help** command on the **Action** menu displays Help topics related to the selection currently displayed in the console window. ActiveRoles Server Help can also be accessed by clicking **Help Topics** on the **Help** menu.
- To see description of a dialog box, click the **Help** button; or click ? on the title bar of the dialog box and click on the dialog box; or press F1 key.
- To see a brief description of a menu command or a toolbar button, point to the command or button.

This manual references Help topics by specifying topic paths in the structure shown on the **Contents** tab in the Help viewer. For example, to access the topic referenced as **ActiveRoles Server/How To/Search for Objects** you should expand the headings **ActiveRoles Server**, **How To** in succession, and then click **Search for Objects** under **How To**.

You can print a single Help topic or all Help topics under a selected heading.

To print a single Help topic

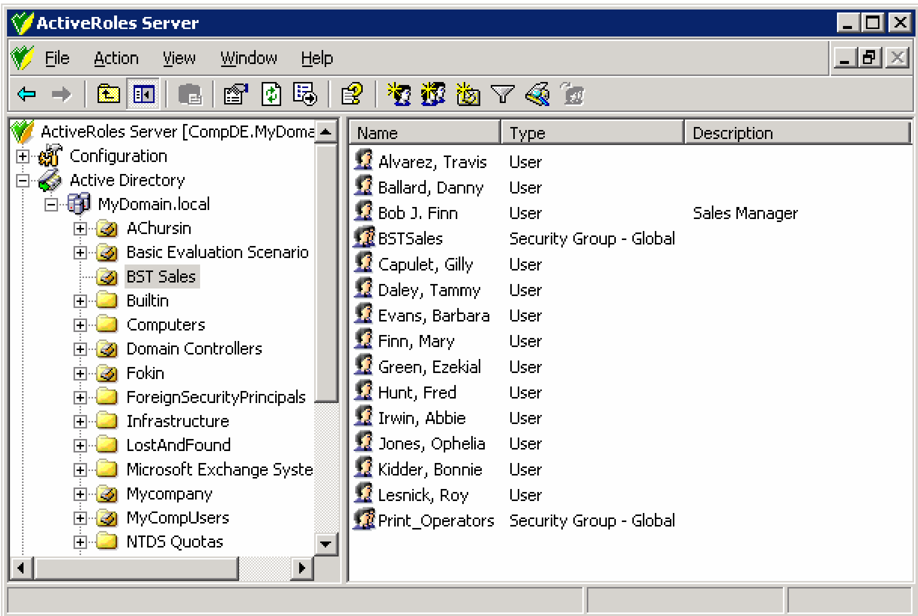
1. On the menu bar, click **Help** and then click **Help Topics**.
2. In the left pane of the Help viewer, expand the heading that contains the topic you want to print, and then click the topic.
3. On the Help viewer toolbar, click **Options**, and then click **Print**.
4. Click **OK** to print only the selected topic.

To print all Help topics under a heading

1. On the menu bar, click **Help**, and then click **Help Topics**.
2. In the left pane of the Help viewer, click the heading that contains the topics you want to print.
3. On the Help viewer toolbar, click **Options**, and then click **Print**.
4. In the Print Topics dialog box, click Print the selected heading and all subtopics, and then click OK.

Interface Overview

When started, the ActiveRoles Server snap-in displays a window similar to that shown below.



The left pane contains the console tree, showing the items that are available in the snap-in. The right pane, known as the details pane, displays information about items selected in the console tree.

Additional information is displayed in the lower sub-pane of the details pane when you check the **Advanced Details Pane** command on the **View** menu. Most management tasks can be performed from the lower sub-pane using commands on the **Action** menu.

Console Tree

The left pane of the ActiveRoles Server snap-in contains the console tree.

The snap-in root is labeled ActiveRoles Server. The name of the Administration Service is shown in square brackets. If you have selected the Advanced mode for ActiveRoles Server snap-in display, the following folders are shown under the snap-in root:

- Configuration
- Active Directory
- Group Policy

Configuration contains all ActiveRoles Server proprietary objects held in containers with appropriate names, and allows you to manage those objects.

Active Directory contains a list of domains registered for management with ActiveRoles Server. The folder allows you to browse domains for directory objects (users, group, computers), and perform management tasks on those objects.

Group Policy contains a list of domains and allows you to select and manage Group Policy objects. From **Group Policy**, you can also perform Group Policy modeling, that is, what-if simulations to determine the effects of Group Policy settings.

The snap-in display mode determines which folders are displayed in the console tree. For more information, see "View Mode" later in this document.

Details Pane

When you select an item in the console tree, the details pane changes accordingly. To perform administrative tasks, click items in the details pane and use commands on the **Action** menu. The **Action** menu commands also appear on the shortcut menu, accessed by right-clicking items in the console tree or details pane.

By default, the objects listed in the details pane are sorted in ascending order by object name. You can change the sorting order by clicking a column heading, and add and remove columns using the **Choose Columns** command on the **View** menu.

The ActiveRoles Server snap-in allows you to apply filters to the details pane in order to search for directory objects. To configure a filter, select a managed domain container and click **Filter Options** on the **View** menu. It is also possible to find an object in the details pane by typing a few characters. This will select the first item in the sorted column that matches what you typed.

Advanced Pane

The advanced pane appears at the bottom of the details pane if you check **Advanced Details Pane** on the **View** menu. You can use the advanced pane to administer an object selected in the console tree or details pane: right-click an existing entry in the list to administer it, or right-click a blank area of the advanced pane to add a new entry.

The advanced pane is comprised of a number of tabbed pages. The selected object determines which tabs are displayed. All possible tabs in the advanced pane and their descriptions are as follows:

- **ActiveRoles Server Security**—Lists ActiveRoles Server Access Templates applied to the selected object.
- **ActiveRoles Server Policy**—Lists ActiveRoles Server Policy Objects applied to the selected object.
- **Native Security**—Lists Active Directory permission entries specified for the selected object.
- **Member Of**—Lists groups to which the selected object belongs.
- **Members**—Lists members of the selected group.
- **Group Policy**—Lists Group Policy objects that are linked to the selected domain or Organizational Unit.
- **Group Policy Inheritance**—Lists Group Policy objects that affect the selected domain or OU, either through direct links or due to inheritance.

ActiveRoles Server snap-in displays the **ActiveRoles Server Security**, **ActiveRoles Server Policy**, and **Native Security** tabs for a selected object only if a user account has the **Read Control** right to the object class.

Depending on the tab you have selected in the advanced pane, the toolbar displays additional buttons to help you work with the entries on the tab.

AR Server Security

 Apply additional Access Templates to the selected object.

 Include Access Templates that affect the selected object due to inheritance.

 Synchronize from ActiveRoles Server security to native Active Directory security.

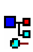
AR Server Policy

 Apply additional Policy Objects to the selected object.

 Include Policy Objects that affect the selected object due to inheritance.

Native Security

 Include permission entries that are inherited from parent objects.

 Include default permission entries specified by the AD schema.

Member Of

 Add the selected object to groups.

 Set the group as the primary group for the selected object.

Group Policy

 Create a new Group Policy object and link it to the selected domain or OU.

 Link an existing Group Policy object to the selected domain or OU.

 Block Group Policy inheritance from the selected domain or OU.

 Edit the Group Policy object associated with the Group Policy link.

 Modify Group Policy link options such as **No Override** and **Disabled**.

 Move the GPO link one step lower in the list.

 Move the GPO link one step higher in the list.

View Mode

In the ActiveRoles Server snap-in you can choose view mode—Basic, Advanced, or Raw. Changing view mode makes it possible to filter out advanced objects and containers from the display.

Basic mode displays Active Directory objects, Managed Units, and Group Policy objects, and filters out objects and containers related to the ActiveRoles Server configuration. Basic mode should normally be used by delegated administrators and help-desk operators.

Advanced mode displays all objects and containers except those reserved for ActiveRoles Server internal use. Advanced mode is designed for administrators who are responsible for configuring the system and managing ActiveRoles Server proprietary objects.

Raw mode displays all objects and containers defined in the ActiveRoles Server namespace. This mode is mainly designed for troubleshooting.

With Raw mode, the snap-in displays all data it receives from the Administration Service. With Basic or Advanced mode, some data is filtered out. For example, the **Configuration** branch is not shown in the console tree with Basic mode. Another example is the **Configuration Container** branch used to display the Active Directory configuration naming context, which is displayed with Raw mode only. In addition, there are some commands and property pages that are only displayed when the snap-in is in Raw mode.

In short, when you choose Raw mode, the snap-in displays everything it is able to display. Otherwise, some items are hidden. Note that changing view mode does not modify any items. Rather, this only shows or hides particular items from the display.

To change view mode, click **Mode** on the **View** menu. In the **View Mode** dialog box, click **Basic Mode**, **Advanced Mode**, or **Raw Mode**.

Controlled Objects

The ActiveRoles Server snap-in provides for visual indication of objects where Access Template, Policy Objects, or Group Policy objects are applied. A special icon is used to mark those objects in the console tree and details pane. For example, a container object is marked with the  icon.

To mark objects, on the **View** menu, click **Mark Controlled Objects**. Select the check boxes to specify categories of objects you want to be marked, and click **OK**.

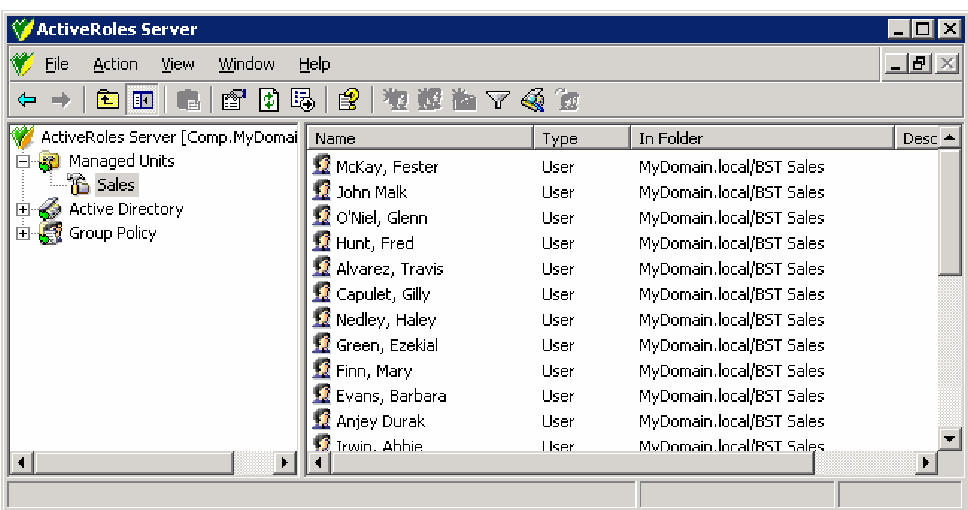
Managed Units

ActiveRoles Server offers these key security and administration elements:

- **Trustees**—Users or groups that have permissions to administer users, groups, computers, or other directory objects.
- **Roles and Permissions**—Permissions are grouped in Access Templates (roles) to define how a Trustee can manage directory objects.
- **Managed Units**—Collections of directory objects delegated to Trustees for administration.

The directory administrator defines which users or groups are designated as Trustees, which roles and permissions are assigned to Trustees, and what objects are included in Managed Units.

Managed Units are used to determine the directory objects that you can administer. As a Trustee, you can administer Managed Units for which you have assigned permissions. Managed Units containing objects you are authorized to administer are displayed under **Managed Units** in the console tree. Basic view mode displays Managed Units and their members.

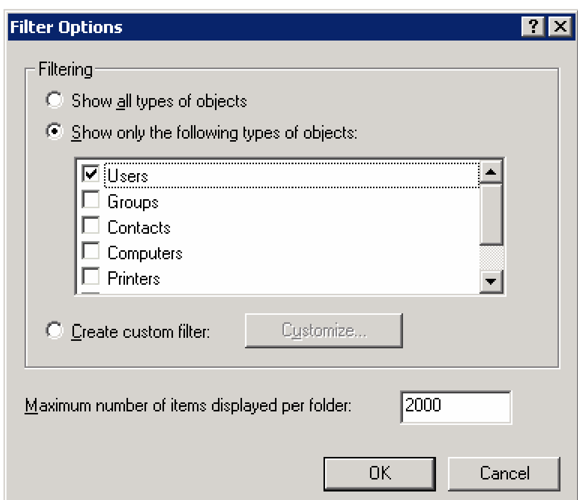


When you select a Managed Unit in the console tree, the details pane displays a list of objects included in that Managed Unit. To administer objects, select them from the list and use the commands on the **Action** menu.

If a Managed Unit includes a container, such as an Organizational Unit, the container is displayed under the Managed Unit in the console tree. When you select a container in the console tree, the details pane lists all child objects and sub-containers held in that container.

Filter Options

The ActiveRoles Server snap-in makes it possible to apply a filter to display only the objects that match the filtering criteria. To apply a filter, select an Active Directory object or container and click on the toolbar. The **Filter Options** dialog box appears.



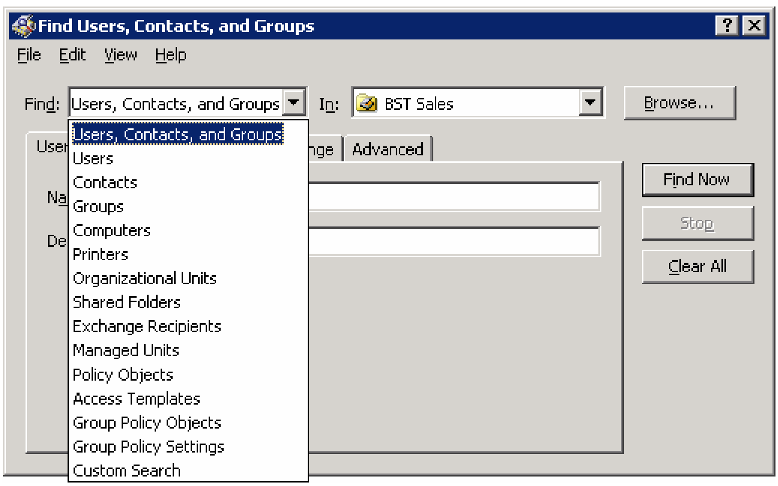
After you set the filter, the filtering criteria immediately take effect on all lists of Active Directory objects in the ActiveRoles Server snap-in.

For instructions on how to set up filter options, see **ActiveRoles Server/How To/Change Views/Sort and Filter Lists in the Details Pane** in ActiveRoles Server Help.

Find Objects

The ActiveRoles Server snap-in allows you to search for objects of different types using the **Find** window. To access the **Find** window, select a container, and click **Find** on the **Action** menu, or click  on the toolbar.

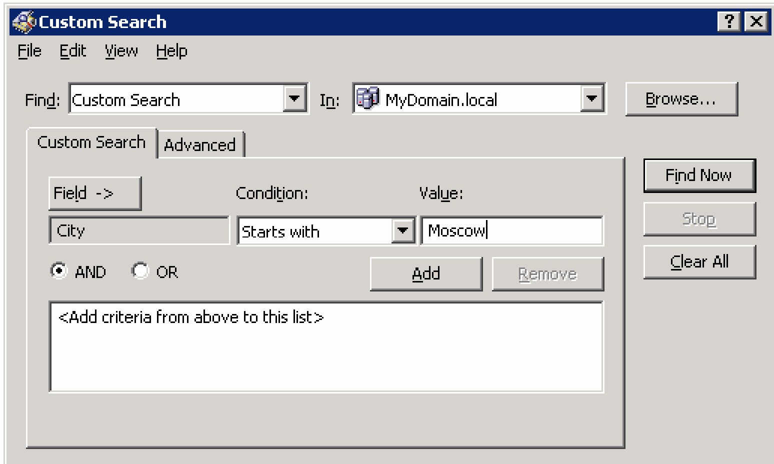
From the **Find** list, select the type of object you want to find. From the **In** list, select the container or Managed Unit you want to search. The list includes the container that you selected before activating the **Find** window. To add containers to the list, click **Browse**.



When you select an object type, the **Find** window changes accordingly. For example, **Users, Contacts, and Groups** searches for users, contacts, or groups using criteria such as user name, a note describing a contact, or the name of an individual who is a member of a particular group.

In the **Find** list, ActiveRoles Server splits the 'Users, Contacts, and Groups' category into three, providing the option for a more streamlined search.

By selecting **Custom Search** from the **Find** list, you can build custom search queries using advanced search options.



Using the **Find** window, you can search for any directory objects, such as users, groups, computers, Organizational Units, printers or shared folders. It is also possible to search for ActiveRoles Server proprietary objects such as Access Templates, Managed Units, and Policy Objects. When you search for Access Templates, Policy Objects or Managed Units and select the proper ActiveRoles Server proprietary object from the **Find** list, then the relevant container appears in the **In** list.

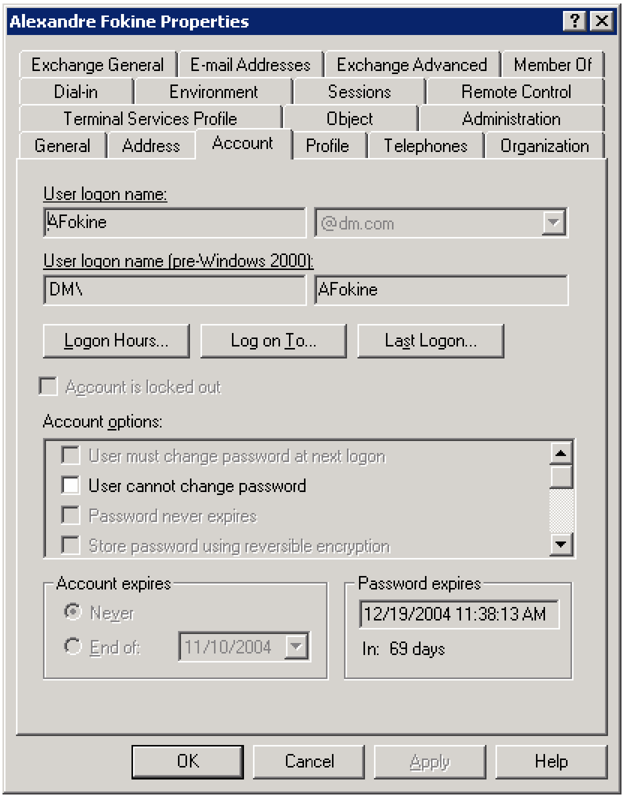
Once the search has completed, the objects matching the search criteria (search results) are listed at the bottom of the **Find** window. You can also quickly find an object in the search results list by typing a few characters. This will select the first name that matches what you typed.

Once you have found the object, you can manage it by right-clicking it in the search results list, and then clicking commands on the shortcut menu.

For detailed instructions on how to perform a search, see **ActiveRoles Server/How To/Search for Objects** in ActiveRoles Server Help.

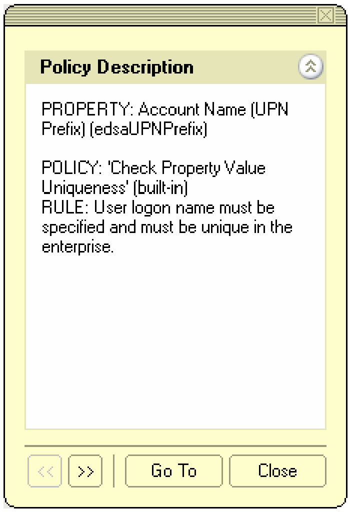
Policy Information

In object creation wizards and properties dialog boxes, some property labels may be displayed as hyperlinks. This indicates that ActiveRoles Server enforces policy restrictions on the property.



To view details of the policy, click the hyperlink to display the policy information.

For example, if you click **User logon name (pre-Windows 2000)**, the following window is displayed.

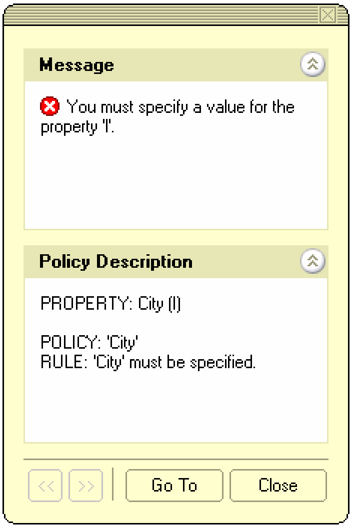


The window may display the following information:

- **Policy Description**—Provides a brief description of the policy.
- **Message**—Details the problem if the supplied property value violates the policy.

Click arrows in the lower-left corner to display description of other policies enforced on the given property.

Message is displayed whenever the specified property value violates the policy.



Click **Go To** and correct your input.

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User Account Management

- Introduction
- Creating a User Account
- Finding a User Account
- Copying a User Account
- Modifying User Account Properties
- Renaming a User Account
- Disabling and Enabling a User Account

- Resetting a User Account Password
- Adding a User Account to Groups
- Removing a User Account from Groups
- Changing a User’s Primary Group
- Performing Exchange Tasks on a User Account
- Moving User Accounts
- Importing User Accounts
- Exporting User Accounts
- Deleting User Accounts

Introduction

User accounts allow users to log on to computers, and control their access to network resources. The operating system relies on the user account information to determine access permissions for the corresponding user.

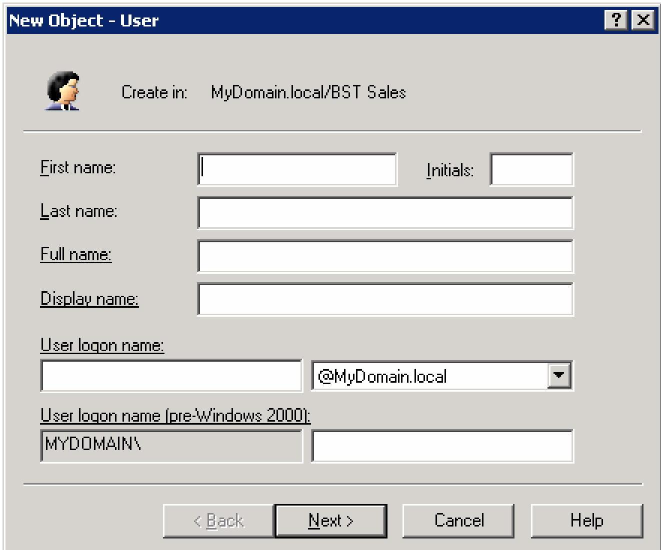
ActiveRoles Server provides the facility to perform administrative tasks such as create, copy, rename, modify, and delete user accounts. It can also be used to unlock accounts, add and remove accounts from groups, and reset user passwords. ActiveRoles Server also supports Exchange tasks, such as create, delete, and move user mailboxes.

The following sections guide you through the ActiveRoles Server MMC Interface to manage user accounts. You can also perform these tasks using the ActiveRoles Server Web Interface.

Creating a User Account

To create a user account: in the console tree, right-click the container where you want to add the user account, point to **New**, click **User**, and then follow the instructions in the wizard.

In the wizard, some property labels may be displayed as hyperlinks. In the screenshot below, these are **Full name**, **Display name**, **User logon name** and **User logon name (pre-Windows 2000)**. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details of the policy, click the hyperlink: the policy information is displayed (see “Policy Information” earlier in this document).



The policy information is also displayed whenever an inputted property value violates a policy restriction. The wizard cannot proceed unless you enter an acceptable value.

For detailed instructions on how to create user accounts, see **ActiveRoles Server/How To/Manage User Accounts/Create a user account** in ActiveRoles Server Help.

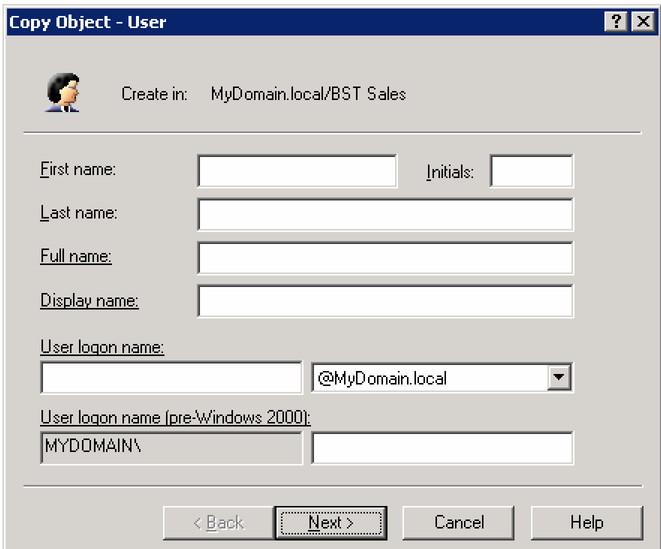
Finding a User Account

To find a user account, select the container you want to search, and click  on the toolbar, or click **Find** on the **Action** menu. In the **Find** window, select **Users** from the **Find** list, specify your search criteria, and start the search. In the search results list, you can perform management activities by right-clicking user accounts and using commands on the shortcut menu. For more information, see "Find Objects" earlier in this document.

For detailed instructions on how to search for user accounts, see **ActiveRoles Server/ How To/Manage User Accounts/Find a user account** in ActiveRoles Server Help.

Copying a User Account

To copy a user account, right-click the account, click **Copy**, and follow the instructions in the wizard. The Copy Object - User wizard.

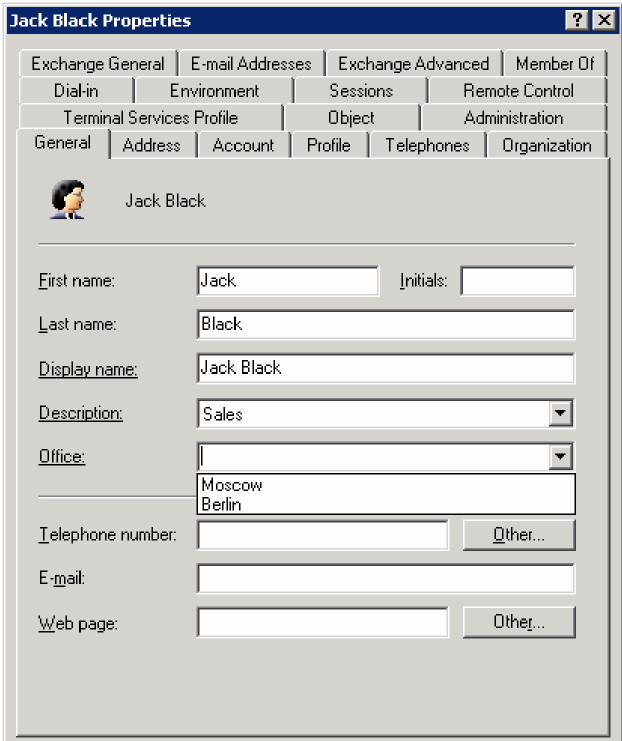


The copy contains the same group memberships and permission settings as the original user account.

For detailed instructions on how to copy a user account, see **ActiveRoles Server/How To/Manage User Accounts/Copy a user account** in ActiveRoles Server Help.

Modifying User Account Properties

To modify user account properties, right-click the account and click **Properties**. You can make changes to user account properties in the **Properties** dialog box.



In the **Properties** dialog box, some property labels may be displayed as hyperlinks. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details of the policy, click the hyperlink: the policy information is displayed (see “Policy Information” earlier in this document).

The policy information is also displayed whenever an inputted property value violates a policy restriction. Property changes cannot be applied unless you enter an acceptable value.

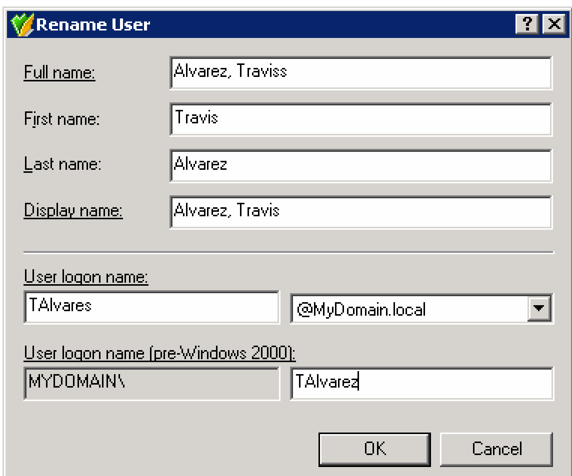
The MMC Interface allows you to select multiple user accounts, and then modify the properties of all selected accounts via a single dialog box.

To modify the advanced properties of a user account, right-click the account, point to **All Tasks**, and then click **Advanced Properties**; or right-click the user account, click **Properties** on the shortcut menu and on the **Object** tab, click **Advanced Properties**.

For detailed instructions on how to modify properties of user accounts, see **ActiveRoles Server/How To/Manage User Accounts/Modify user account properties** in ActiveRoles Server Help.

Renaming a User Account

To rename a user account, right-click the account and click **Rename**. Type a new name and press ENTER. In the **Rename User** dialog box, you can change the user's first name, last name, display name, and logon name.



In the **Rename User** dialog box, hyperlinks are used to indicate the properties controlled by ActiveRoles Server policies (see "Policy Information" earlier in this document).

For detailed instructions on how to rename user accounts, see **ActiveRoles Server/ How To/Manage User Accounts/Rename a user account** in ActiveRoles Server Help.

Disabling and Enabling a User Account

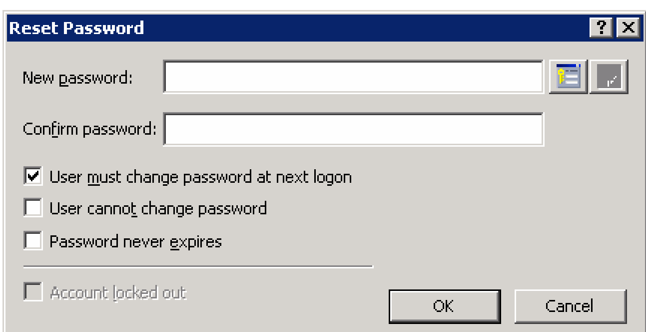
A user account can be disabled as a security measure to prevent a particular user from logging on, rather than deleting the user account.

To disable a user account, right-click the account and click **Disable Account**. To enable a user account, right-click a disabled account and click **Enable Account**. The **Enable Account** command only appears on disabled accounts. Disabled user accounts are marked with the icon.

For detailed instructions on how to disable and enable user accounts, see **ActiveRoles Server/How To/Manage User Accounts/Disable a user account and How To/Manage User Accounts/Enable a disabled user account** in ActiveRoles Server Help.

Resetting a User Account Password

To reset the password for a user account, right-click the account and click **Reset Password**. In the **Reset Password** dialog box, it is possible to generate passwords, set password options, and unlock the account if it is locked out. To generate a password, click the button next to the **New Password** box.

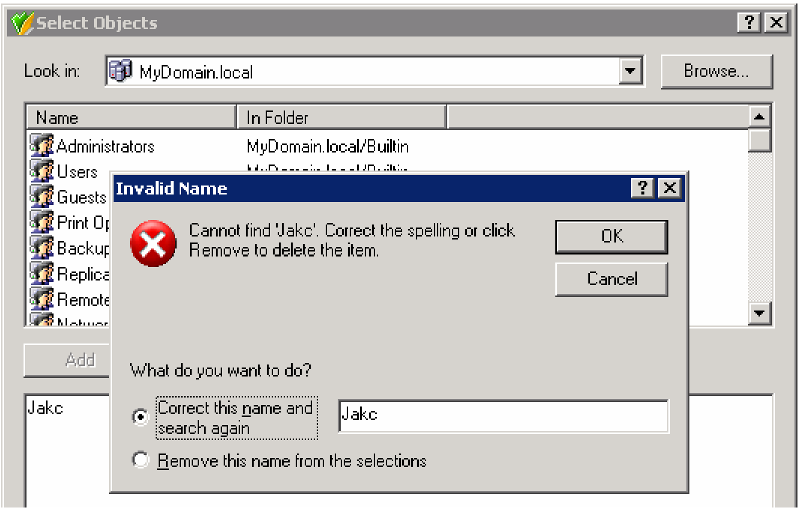


For detailed instructions on how to reset a password, see **ActiveRoles Server/How To/Manage User Accounts/Reset a user password** in ActiveRoles Server Help.

Adding a User Account to Groups

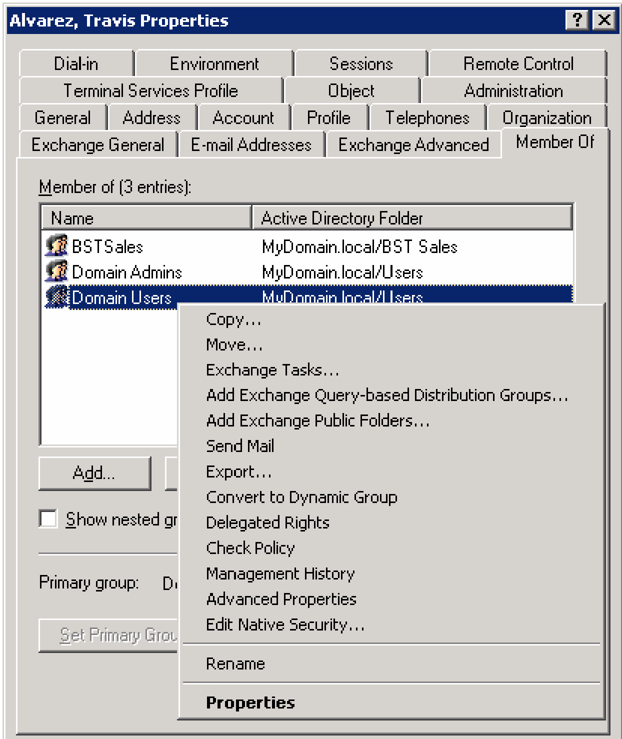
To add a user account to groups, right-click the account and click **Add to a group**. The **Select Objects** dialog box allows you to select groups and add the user account to the selected groups.

In the **Select Objects** dialog box, you can select groups from the list or type group names. Use the **Check Names** button to verify the names you type. If ActiveRoles Server cannot find a group, it prompts you to correct the name.



You can also add a user account to groups by modifying the group membership list on the **Member Of** tab in the **Properties** dialog box. To display the **Properties** dialog box, right-click the user account and click **Properties**.

The **Member Of** tab lists the groups to which the user account belongs. If the **Show nested groups** check box is selected, then the list will also include groups to which the user belongs due to group nesting.



The **Member Of** tab enables you to manage groups directly from the list of groups. To manage a group, right-click it, and use commands on the shortcut menu.

To add a user account to groups, click **Add**. The **Select Objects** dialog box allows you to select the groups to which the user account will be added.

When you select multiple user accounts, the **Member Of** tab lists the groups to which all the selected accounts belong. If one of the accounts does not belong to a given group, that group does not appear in the list.

For detailed instructions on how to add users to a group, see **ActiveRoles Server/How To/Manage User Accounts/ Add a user account to a group** in ActiveRoles Server Help.

Removing a User Account from Groups

To remove a user account from groups, right-click the user account, click **Properties**, and go to the **Member Of** tab. On the **Member Of** tab, select groups from the list and click **Remove**.

For detailed instructions on how to remove users from a group, see **ActiveRoles Server/How To/Manage User Accounts/Remove a user account from a group** in ActiveRoles Server Help.

Changing a User’s Primary Group

The user’s primary group applies only to users who log on to the network through Services for Macintosh, or to users who run POSIX-compliant applications. If you are not using these services, there is no need to change the primary group from Domain Users, which is the default value.

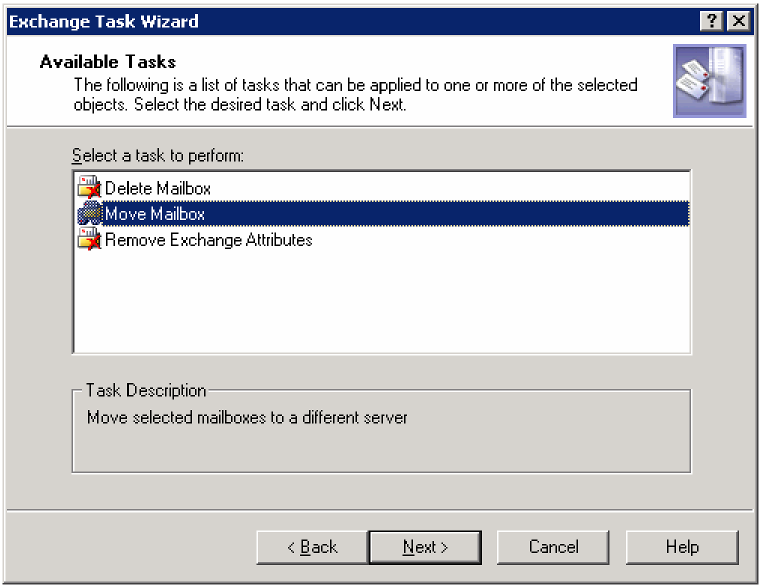
To change a user’s primary group, right-click the account, click **Properties**, and go to the **Member Of** tab. On the **Member Of** tab, select a group from the list and click the **Set Primary Group** button. Note that only a global or universal security group can be set as the primary group. If you select a group with group scope the Domain local, or a distribution group, the **Set Primary Group** button would be unavailable.

For detailed instructions on how to change a user’s primary group, see **ActiveRoles Server/How To/Manage User Accounts/Change a user’s primary group** in ActiveRoles Server Help.

Performing Exchange Tasks on a User Account

To perform Exchange tasks on a user account, right-click the account, click **Exchange Tasks**, and follow the instructions in the Exchange Task Wizard.

The Exchange Task Wizard helps you manage Exchange 2000/2003 recipients by providing a set of tasks that apply to the selected account.

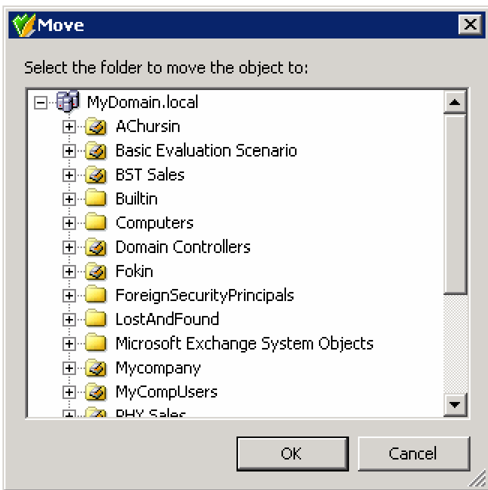


For additional information, see “Exchange Tasks on User Accounts” later in this document.

For detailed instructions on how to perform Exchange tasks on user accounts, see **ActiveRoles Server/How To/Manage User Accounts/Perform Exchange tasks** in ActiveRoles Server Help.

Moving User Accounts

To move user accounts to another container, select the accounts, right-click the selection, and then click **Move**. In the **Move** dialog box, select the container to which you want to move the accounts.



MMC 2.0 provides the drag-and-drop option for moving objects. To move an object, drag the object from the details pane to a destination container in the console tree.

For detailed instructions on how to move user accounts between directory folders, see **ActiveRoles Server/How To/Manage User Accounts/Move a user account** in ActiveRoles Server Help.

Importing User Accounts

To import a user account, right-click a container or an Organizational Unit where you want to save an imported user account, and then click **Import**. In the **Import Directory Objects** dialog box, select an .xml file, and click **Open**. The user account from the file will be saved in the selected container or Organizational Unit.

For detailed instructions on how to import a user account, see **ActiveRoles Server/How To/Manage User Accounts/Import a user account** in ActiveRoles Server Help.

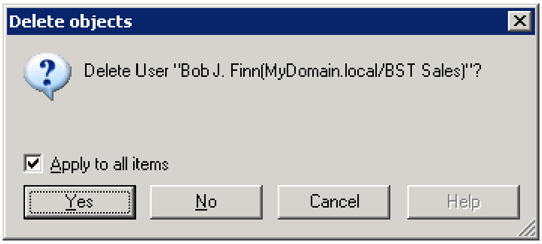
Exporting User Accounts

To export a user account, right-click that user account, point to **All Tasks,** and then click **Export**. In the open dialog box, select a folder where to save the exported user account, enter a file name in the **File name** box, and click **Save**. The user account will be saved to the .xml file.

For detailed instructions on how to export a user account, see **ActiveRoles Server/ How To/Manage User Accounts/Export a user account** in ActiveRoles Server Help.

Deleting User Accounts

To delete a user account, select the account, right-click the selection, and then click **Delete**. In the open dialog box, click **Yes**. If you delete several user accounts, then the **Delete objects** dialog box appears. In the dialog box, select the **Apply to all items** check box, and then click **Yes**.



Note that deleting a user account is an irreversible operation. A new user account with the same name as a deleted user account does not automatically assume the permissions and memberships of the deleted account. For this reason, it is recommended that you disable rather than delete accounts.

For detailed instructions on how to delete user accounts, see **ActiveRoles Server/How To/Manage User Accounts/Move a user account** in ActiveRoles Server Help.

4

Group Management

- Introduction
- Creating a Group
- Finding a Group
- Copying a Group
- Modifying Group Properties
- Changing Group Type and Group Scope
- Renaming a Group
- Assigning a Manager over a Group

- Adding Members to a Group
- Removing Members from a Group
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- Moving Groups
- Importing Groups
- Exporting Groups
- Deleting Groups
- Administering Dynamic (Rules-Based) Groups
- Administering Query-based Distribution Groups

Introduction

Groups are Active Directory objects used to collect users, contacts, computers, and other groups into manageable units. There are three kinds of groups:

- **Security groups**—Used to manage user and computer access to shared network resources. When assigning permissions to access resources, administrators assign permissions to security groups rather than to individual users.
- **Distribution groups**—Used as e-mail distribution lists. Distribution groups have no security function.
- **Query-Based Distribution groups**—Used also as e-mail distribution lists but the difference that members of such a group are not specified statically. Membership of these groups is built in dynamic manner using LDAP queries.

In terms of this document security and distribution groups is mentioned as group, but for a Query-based distribution group we refer as Query-based distribution group.

Security and distribution group has a scope: universal, global, or domain local.

- **Universal**—Universal groups can include groups and accounts from any domain in the domain tree or forest, and can be granted permissions in any domain in the domain tree or forest.
- **Global**—Global groups can only include groups and accounts from the domain in which the group is defined. Global groups can be granted permissions in any domain in the forest.
- **Domain Local**—Domain local groups can include groups and accounts from a Windows 2000 or Windows NT domain. These groups can only be granted permissions within the domain in which the group is defined.

A group can be a member of another group. This is referred to as group nesting. Group nesting increases the number of affected member accounts and thus consolidates group management. Accounts that reside in a group nested within another group are indirect members of the nesting group.

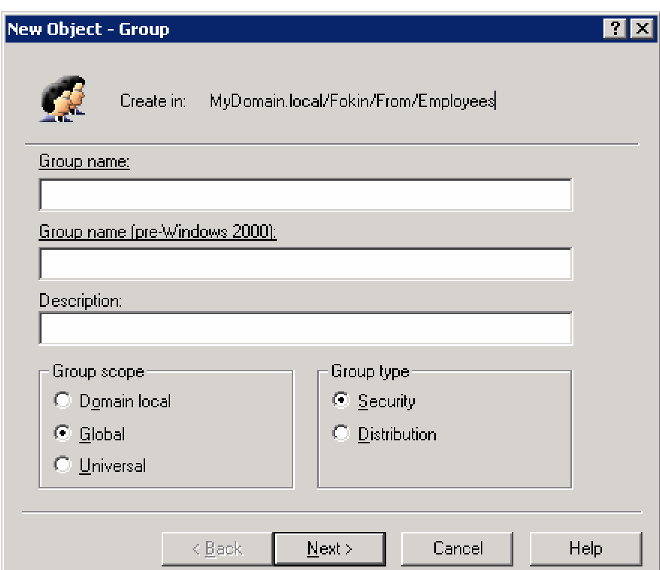
ActiveRoles Server provides the facility to perform administrative tasks such as create copy, rename, modify, and delete groups. It can also be used to add and remove members from groups and perform Exchange tasks on groups.

The following sections describe how to use the ActiveRoles Server MMC Interface to manage groups. Groups can also be managed via the ActiveRoles Server Web Interface.

Creating a Group

To create a group: in the console tree, right-click the container where you want to add the group, point to **New**, click **Group**, and follow the instructions in the wizard.

In the wizard, some property labels may be displayed as hyperlinks. For example, in the screen below, these are the **Group name** and the **Group name (pre-Windows 2000)** boxes. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see "Policy Information" earlier in this document).



The policy information is also displayed whenever an inputted property value violates a policy restriction. The wizard cannot proceed unless you enter an acceptable value.

For detailed instructions on how to create groups, see **ActiveRoles Server/How To/ Manage Groups/Create a group** in ActiveRoles Server Help.

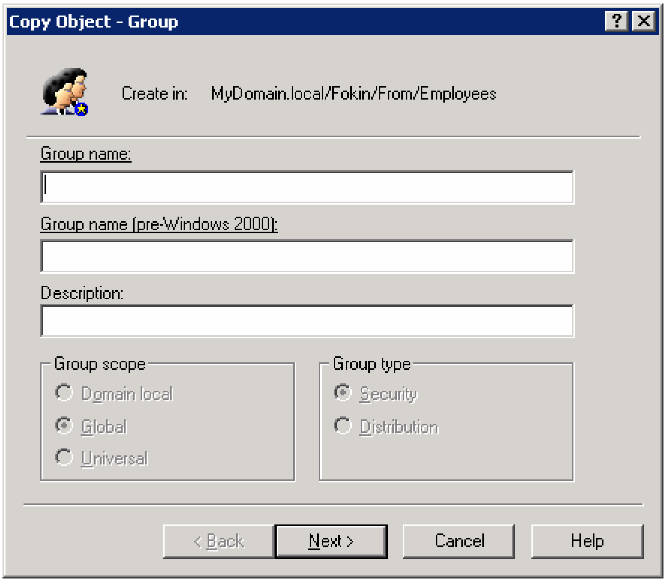
Finding a Group

To find a group, select the container you want to search, and click on the toolbar, or click **Find** on the **Action** menu. In the **Find** window, select **Groups** from the **Find** list, specify your search criteria, and start the search. In the search results list, right-click groups and use commands on the shortcut menu to perform management activities. For more information, see “Find Objects” earlier in this document.

For detailed instructions on how to search for groups, see **ActiveRoles Server/How To/Manage Groups/Find a group** in ActiveRoles Server Help.

Copying a Group

To create a copy of a group, right-click the group, click **Copy**, and follow the instructions in the wizard. The Copy Object - Group wizard starts.



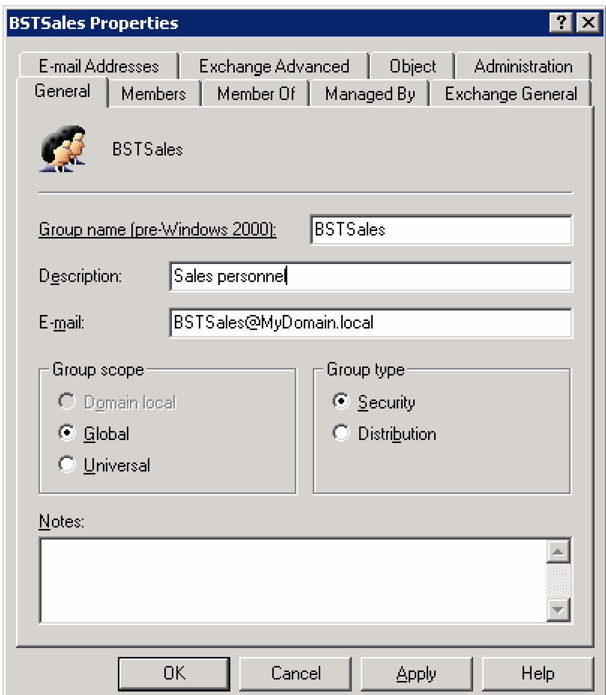
The copy contains the same permission settings as the original group. The Copy Object - Group wizard allows you to modify the membership list of the new group.

While copying a group, ActiveRoles Server doesn't allow you to change the group scope or the group type.

For detailed instructions on how to copy a group, see **ActiveRoles Server/How To/Manage Groups/Copy a group** in ActiveRoles Server Help.

Modifying Group Properties

To modify group properties, right-click the group, and then click **Properties**. You can make changes to group properties using the **Properties** dialog box.



In the **Properties** dialog box, some property labels may be displayed as hyperlinks. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see "Policy Information" earlier in this document).

The policy information is also displayed whenever an inputted property value violates a policy restriction. Property changes cannot be applied unless you enter an acceptable value.

The MMC Interface allows you to select multiple groups, and then modify the properties of all selected groups via a single dialog box.

To modify the advanced properties of a group, right-click the group, point to **All Tasks**, and then click **Advanced Properties**; or right-click the group, click **Properties** on the shortcut menu and on the **Object** tab, click **Advanced Properties**.

For detailed instructions on how to modify group properties, see **ActiveRoles Server/ How To/Manage Groups/Modify group properties** in ActiveRoles Server Help.

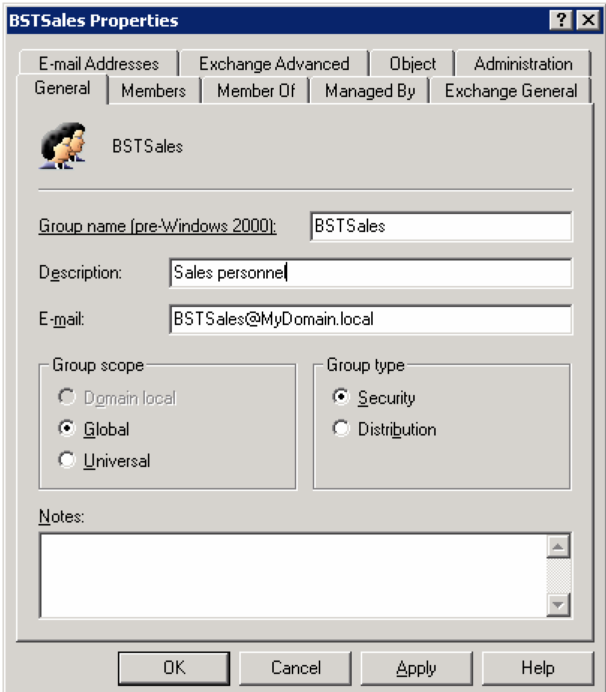
Changing Group Type and Group Scope

Group type can be changed from Security to Distribution, and vice versa, if there are no pre-Windows 2000 domain controllers in the domain (native-mode domain).

It is forbidden to change group scope in a domain with pre-Windows 2000 domain controllers (mixed-mode domain). The following conversions are allowed in a native-mode domain:

- **Global to Universal**—Only allowed if the group being converted is not a member of another group with global scope.
- **Domain Local to Universal**—Only allowed if the group being converted does not contain a member that is itself another group with domain local scope.

To change the group scope or group type, right-click the group, click **Properties**, and go to the **General** tab. On the **General** tab, click the group type in the **Group type** area or click the group scope under **Group scope**.

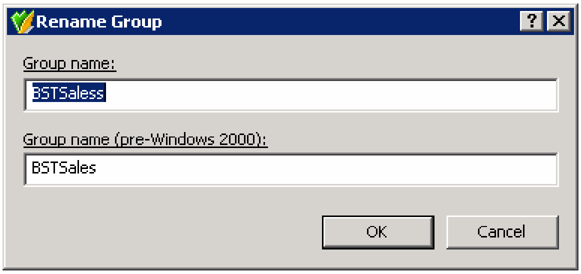


For detailed instructions on how to convert groups to another type, see **ActiveRoles Server/How To/Manage Groups/Convert a group to another group type** in ActiveRoles Server Help.

For detailed instructions on how to change group scope, see **ActiveRoles Server/How To/Manage Groups/Change group scope** in ActiveRoles Server Help.

Renaming a Group

To rename a group, right-click the group, and then click **Rename**. Type a new name and press ENTER. In the **Rename Group** dialog box, you can change the group name and group name (pre-Windows 2000).

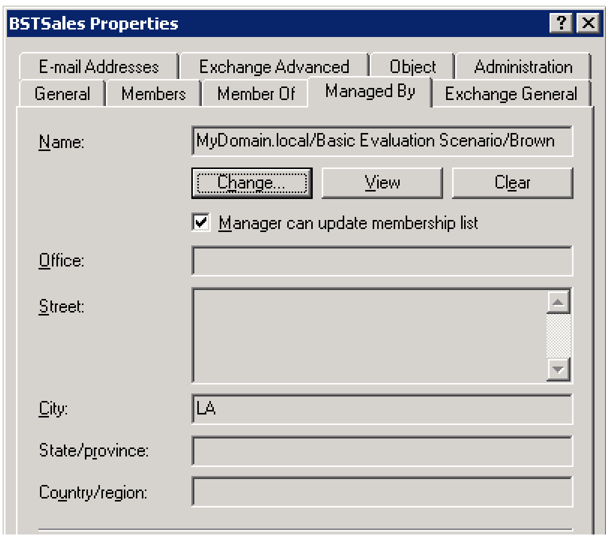


In the **Rename Group** dialog box, hyperlinks are used to indicate the properties controlled by ActiveRoles Server policies (see "Policy Information" earlier in this document).

For detailed instructions on how to rename groups, see **ActiveRoles Server/ How To/Manage Groups/Rename a group** in ActiveRoles Server Help.

Assigning a Manager over a Group

To assign a manager over a group, right-click the group, click **Properties**, and click the **Managed By** tab. On the **Managed By** tab, click **Change** and select the user or contact to designate as the manager.



If you select **Manager can update membership list**, the manager can use ActiveRoles Server to add and remove members from the group.

For detailed instructions on how to assign a manager over a group, see **ActiveRoles Server/How To/Manage Groups/Assign a Manager over a Group** in ActiveRoles Server Help.

Adding Members to a Group

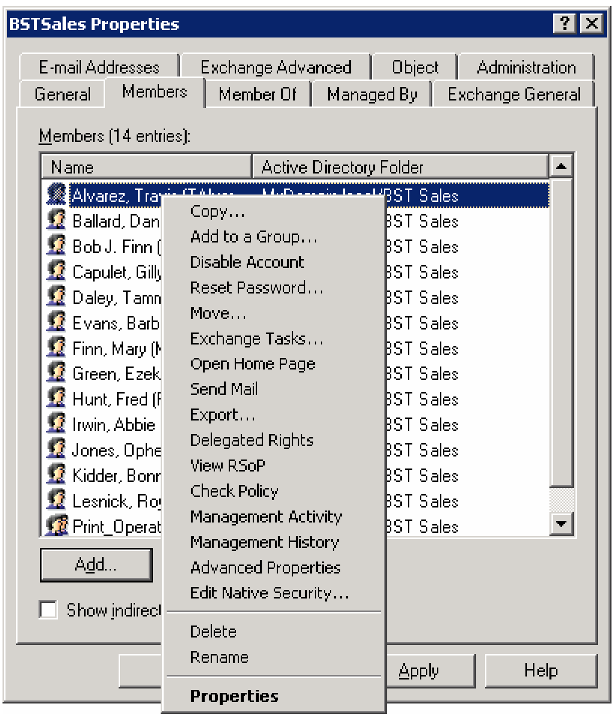
Depending on its scope, a group may contain members (users, groups, computers, contacts) from anywhere in the forest, or only members from its own domain.

To add members to a group, right-click the group, click **Properties**, and go to the **Members** tab. On the **Members** tab, click **Add**. The **Select Objects** dialog box allows you to select and add objects to the group.

In the **Select Objects** dialog box, you can select objects from the list or type object names. Use the **Check Names** button to verify the names that you type. If ActiveRoles Server cannot find an object, it prompts you to correct the name.

The **Members** tab lists objects that belong to the group. If the **Show indirect members** check box is selected, the list will also include objects that belong to the group due to group nesting.

The **Members** tab enables management of objects directly from the list of members. To manage a group member, right-click the member and use commands on the shortcut menu.



When you select multiple groups, the **Members** tab lists the objects that belong to each of the selected groups. If a given object does not belong to one of the selected groups, then that object does not appear in the list.

For detailed instructions on how to add members to groups, see **ActiveRoles Server/ How To/Manage Groups/Add a member to a group** in ActiveRoles Server Help.

Removing Members from a Group

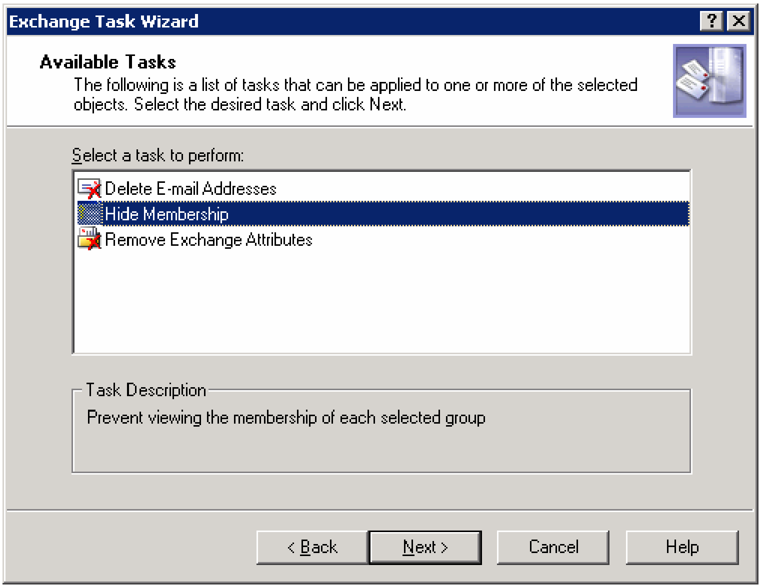
To remove members from a group, right-click the group, click **Properties**, and go to the **Members** tab. On the **Members** tab, select members from the list and click **Remove**.

For detailed instructions on how to remove members from groups, see **ActiveRoles Server/How To/Manage Groups/Remove a member from a group** in ActiveRoles Server Help.

Performing Exchange Tasks on a Group

To perform Exchange tasks on a group, right-click the group, click **Exchange Tasks**, and follow the instructions in the Exchange Task Wizard.

The Exchange Task Wizard helps you manage Exchange 2000/2003 recipients by providing a set of tasks that apply to the selected group.

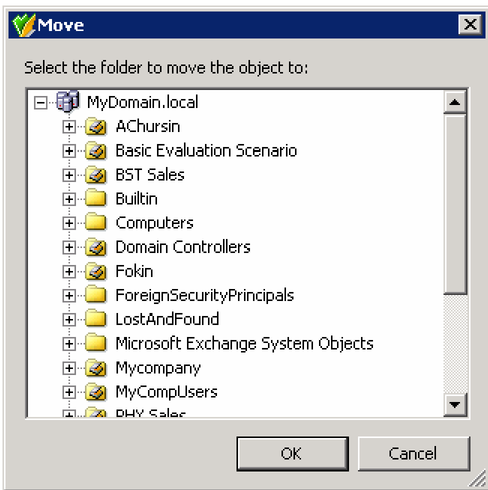


For additional information, see “Exchange Tasks on Groups” later in this document.

For detailed instructions on how to perform exchange tasks on groups, see **ActiveRoles Server/How To/Manage Groups/Perform Exchange tasks** in ActiveRoles Server Help.

Moving Groups

To move groups to another container, select the groups, right-click the selection, and click **Move**. In the **Move** dialog box, select the container to which you want to move the groups.



MMC 2.0 provides the drag-and-drop option for moving objects. To move an object, drag the object from the details pane to a destination container in the console tree.

For detailed instructions on how to move groups between directory folders, see **ActiveRoles Server/How To/Manage Groups/Move a group** in ActiveRoles Server Help.

Importing Groups

To import a group, right-click a container or an Organizational Unit where you want to save an imported group, and then click **Import**. In the **Import Directory Objects** dialog box, select an .xml file, and click **Open**. The group from the file will be saved in the selected container or Organizational Unit.

For detailed instructions on how to import a group, see **ActiveRoles Server/How To/Manage Groups/Import a group** in ActiveRoles Server Help.

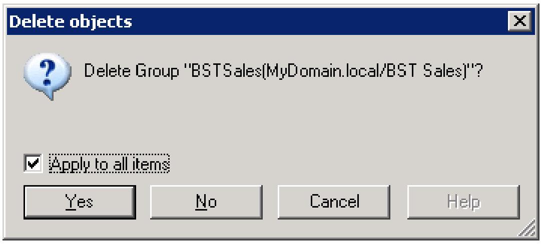
Exporting Groups

To export a group, right-click that group, point to **All Tasks,** and then click **Export**. In the open dialog box, select a folder where to save the exported group, enter a file name in the **File name** box, and click **Save**. The group account will be saved to the .xml file.

For detailed instructions on how to export a group, see **ActiveRoles Server/ How To/Manage Group/Export a group** in ActiveRoles Server Help.

Deleting Groups

To delete a group, select the group, right-click the selection, and then click **Delete**. In the open dialog box, click **Yes**. If you delete several groups, then the **Delete objects** dialog box appears. In the dialog box, select the **Apply to all items** check box, and then click **Yes**.



Note that deleting a group is an irreversible operation. A new group with the same name as a deleted group does not automatically assume the permissions and memberships of the deleted group. When recreating a deleted group, you need to manually add all permissions and memberships.

For detailed instructions on how to delete groups, see **ActiveRoles Server/How To/Manage Groups/Delete a group** in ActiveRoles Server Help.

Administering Dynamic (Rules-Based) Groups

ActiveRoles Server gives you the option to automatically keep group membership lists up to date, eliminating the need to add and remove members manually. To automate the maintenance of group membership lists, ActiveRoles Server employs the following features:

- Rules-based mechanism that automatically adds and removes objects to groups whenever object attributes change in Active Directory.
- Flexible membership criteria that enable both query-based and static population of groups.

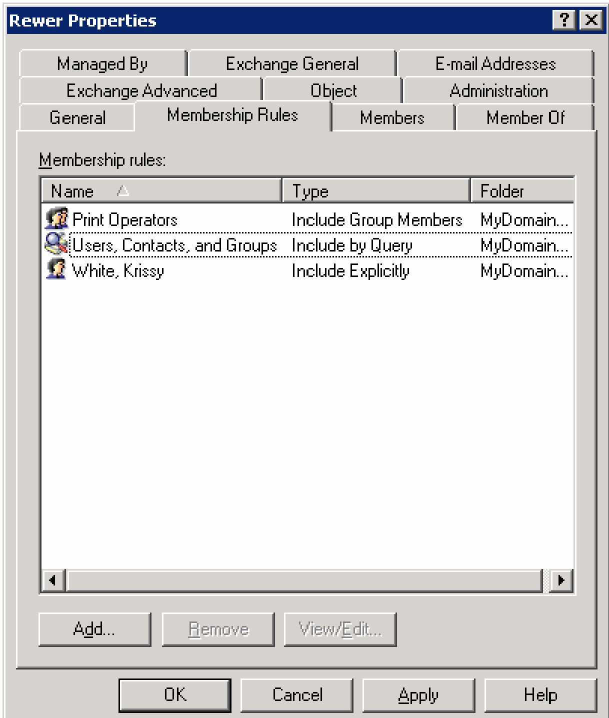
Rules-based groups are called dynamic groups. Active Directory groups are called basic groups.

To make a group dynamic, right-click the group, click **Convert to Dynamic Group**, select a rule type, and then configure a rule. For detailed instructions, see **ActiveRoles Server/How To/Manage Groups/ Add a Membership Rule to a group** in ActiveRoles Server Help.

When you convert a basic group to a dynamic group, the group loses all members that were added to the group when it was basic. This is because members of a dynamic group can be defined only by membership rules.

Once membership rules are added to a group, the group only includes the objects that satisfy the membership rules. Any changes made directly to the membership list by any administrative tool will be overridden.

For dynamic groups, the **Properties** dialog box includes the **Membership Rules** tab. Use the **Membership Rules** tab to examine, add, modify, or remove membership rules.



The **Members** tab for a dynamic group cannot be used to manage the membership list. It is only used to display the group members.

To stop a group being dynamic (make it a basic group), right-click the group, click **Convert to Basic Group**. You will be asked to confirm that you want to convert the group to a basic group. Click **Yes**.

When converting a dynamic group to a basic group, the membership rules only are removed from the group. The membership list remains unchanged.
Dynamic groups are marked with the  icon.

For more information about dynamic groups, refer to the “Dynamic Groups Management” section in the ActiveRoles Server Administrator’s Guide.

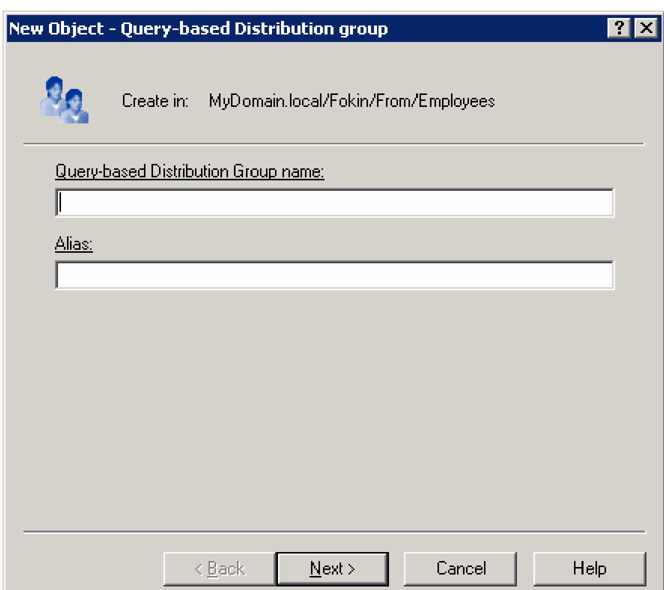
A special note on the **General** tab makes it possible to distinguish between dynamic groups and basic groups when using administrative tools other than ActiveRoles Server.

Administering Query-based Distribution Groups

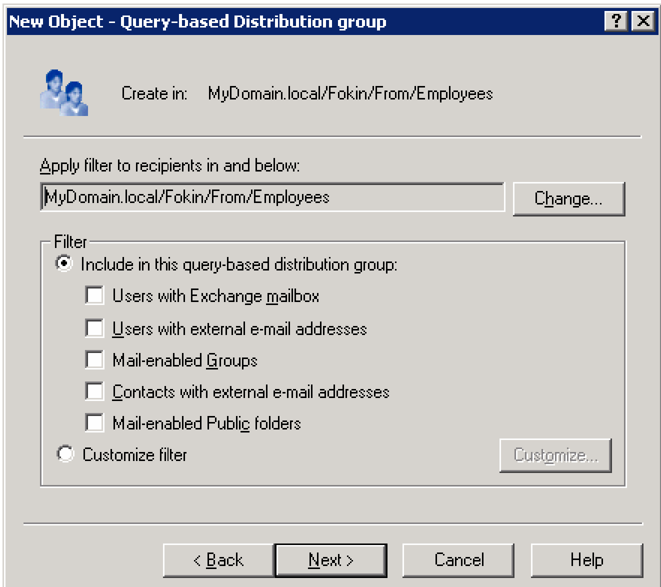
The query-based distribution group is type of distribution group that is introduced in the Exchange 2003. The difference from the usual distribution group is that members of query-based group are not statically placed into it; an e-mail is propagated among the members of the group, but only among those of them who is currently in the state to comply the specified LDAP query of this distribution group.

To create a query-based distribution group: in the console tree, right-click the container where you want to add the group, point to **New**, click **Query-based Distribution Group**, and follow the instructions in the wizard.

In the wizard, some property labels may be displayed as hyperlinks. For example, in the screen below, these are **Query-based Distribution Group name** and **Alias**. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see "Policy Information" earlier in this document).



The policy information is also displayed whenever an inputted property value violates a policy restriction. The wizard cannot proceed unless you enter an acceptable value. When you type the group's name and, optionally, modify its alias**,** click **Next** to open next window of the wizard.



On this window specify the filter that is used for building of the group's membership list. Choose between predefined filters and customizable filter which is created using LDAP query. In the first case click **Include in this query-based distribution group** and select the appropriate check boxes; to customize filter, click **Customize filter** and click **Customize**. In the second case the **Custom Search** dialog box appears. For information on how to complete this dialog box, see "Find Objects" this document. After creation of the filters click **Next**, and click **Finish** on the last window to close the wizard and create the Query-based distribution group.

To administer a query-based distribution group, right-click the group and click **All Tasks**. Perform the proper administering action.

For detailed instructions on how to create groups, see **ActiveRoles Server/How To/ Manage Groups/ Managing a Query-Based Distribution Group** in ActiveRoles Server Help.

5

Computer Account Management

- Introduction
- Creating a Computer Account
- Finding a Computer Account
- Modifying Computer Account Properties
- Disabling and Enabling a Computer Account
- Resetting a Computer Account
- Adding a Computer Account to Groups

- Removing a Computer Account from Groups
- Moving Computer Accounts
- Importing Computer Accounts
- Exporting Computer Accounts
- Deleting Computer Accounts

Introduction

Computer accounts are Active Directory objects used to represent physical computers. Computer accounts allow computers to join the domain, and control their access to resources on the network. The operating system uses computer account information to determine access permissions for a computer.

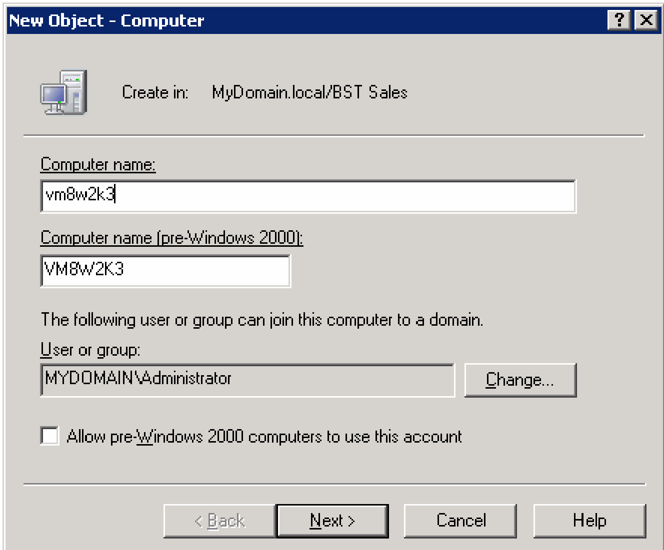
ActiveRoles Server provides the facility to perform administrative tasks such as create, modify, and delete computer accounts. ActiveRoles Server can also be used to disable and enable accounts, add and remove accounts from groups, and reset accounts.

The following sections explain how to use the MMC Interface to manage computer accounts. You can also perform these tasks using the Web Interface.

Creating a Computer Account

To create a computer account: in the console tree, right-click the container where you want to add the account, point to **New**, click **Computer**, and follow the instructions in the wizard.

In the wizard, some property labels may be displayed as hyperlinks. In the screen below, these are the **Computer name** and the **Computer name (pre-Windows 2000)** boxes. The hyperlink indicates that ActiveRoles Server enforces policy restrictions on the property. To view details of the policy, click the hyperlink: the policy information is displayed (see “Policy Information” earlier in this document).



The policy information is also displayed whenever an inputted property value violates a policy restriction. The wizard cannot proceed unless you enter an acceptable value.

For detailed instructions on how to create computer accounts, see **ActiveRoles Server/How To/Manage Computer Accounts/Create a computer account** in ActiveRoles Server Help.

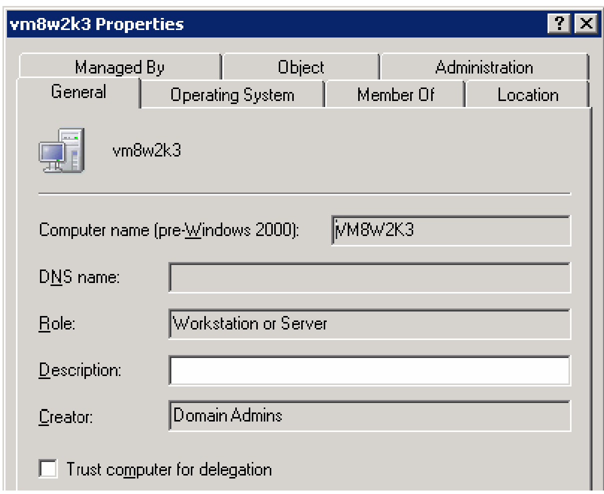
Finding a Computer Account

To find a computer account, select the container you want to search, and click  on the toolbar, or click **Find** on the **Action** menu. In the **Find** window, select **Computers** from the **Find** list, specify your search criteria, and start the search. In the search results list, you can right-click found computers and use commands on the shortcut menu to perform management tasks. For more information, see “Find Objects” earlier in this document.

For detailed instructions on how to search for computer accounts, see **ActiveRoles Server/How To/Search for Objects/Search for a Computer** in ActiveRoles Server Help.

Modifying Computer Account Properties

To modify computer account properties, right-click the account, and click **Properties**. You can change computer account properties using the **Properties** dialog box.



In the **Properties** dialog box, some property labels may be displayed as hyperlinks. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see “Policy Information” earlier in this document).

The policy information is also displayed whenever the inputted property value violates a policy restriction. Property changes cannot be applied unless you enter an acceptable value.

The MMC Interface allows you to select multiple computer accounts, and then modify the properties of all selected accounts via a single dialog box.

To modify the advanced properties of a computer account, right-click the account, point to **All Tasks**, and then click **Advanced Properties**; or right-click the computer account, click **Properties** on the shortcut menu and on the **Object** tab, click **Advanced Properties**.

For detailed instructions on how to modify computer account properties, see **ActiveRoles Server/How To/Manage Computer Accounts/Modify computer account properties** in ActiveRoles Server Help.

Disabling and Enabling a Computer Account

A computer account can be disabled as a security measure to prevent users from logging on to the computer, rather than deleting the computer account.

To disable a computer account, right-click the account and click **Disable Account**. To enable a computer account, right-click the account and click **Enable Account**. The **Enable Account** command appears only on disabled accounts. Disabled computer accounts are marked with the  icon.

For detailed instructions on how to disable and enable computer accounts, see **ActiveRoles Server/How To/Manage Computer Accounts/Disable a computer account and How To/Manage Computer Accounts/Enable a disabled computer account** in ActiveRoles Server Help.

Resetting a Computer Account

A computer account is normally reset if the computer has been taken offline and completely reinstalled. Resetting the account allows the (rebuilt) computer to rejoin the domain using the same name. If the computer account is reset whenever the computer has not been reinstalled, the computer cannot authenticate in the domain.

To reset a computer account, right-click the account, and click **Reset Account**. This command resets the computer account password. The **Reset Account** command is not available on domain controller accounts: resetting the password for domain controllers using this method is not allowed.

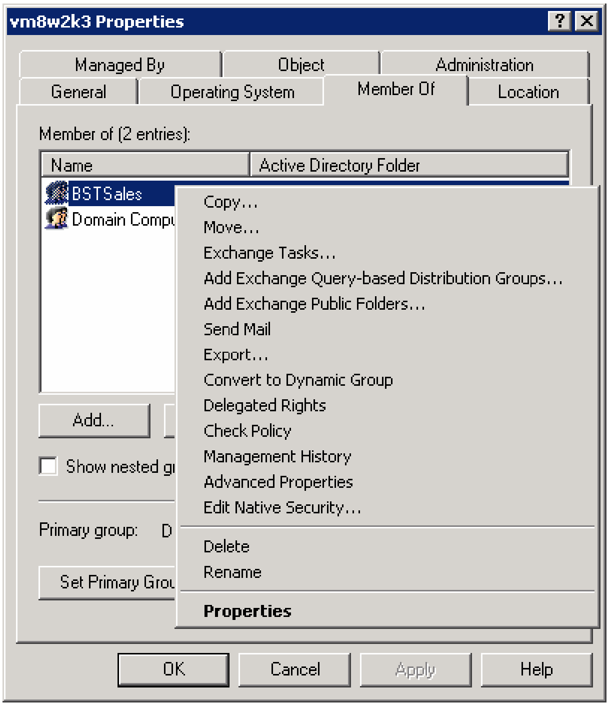
Adding a Computer Account to Groups

Adding a computer account to a group enables you to assign permissions to all computer accounts in the group, and to filter Group Policy settings on all accounts in the group.

To add a computer account to groups, right-click the account and click **Add to a Group**. The **Select Objects** dialog box appears. The dialog box allows you to select groups to which the computer account will be added (see “Adding a user account to group” earlier in this document).

You can also add a computer account to groups by modifying the group membership list on the **Member Of** tab in the **Properties** dialog box. To display the **Properties** dialog box, right-click the computer account and click **Properties**.

The **Member Of** tab lists the groups to which the computer account belongs. If the **Show nested groups** check box is selected, the list will also include groups that the computer account belongs to due to group nesting.



The **Member Of** tab enables you to manage groups directly from the list of groups. To manage a group, right-click it, and use commands on the shortcut menu.

To add a computer account to groups, click **Add**. The **Select Objects** dialog box allows you to select the groups to which the computer account will be added.

When you select multiple computer accounts, the **Member Of** tab lists the groups to which all the selected accounts belong. If one of the accounts does not belong to a given group, that group does not appear in the list.

For detailed instructions on how to add computer accounts to groups, see **ActiveRoles Server/How To/Manage Computer Accounts/Add a computer account to a group** in ActiveRoles Server Help.

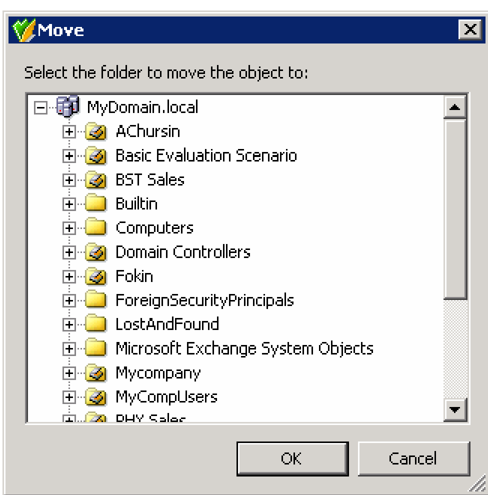
Removing a Computer Account from Groups

To remove a computer account from groups, right-click the account, click **Properties**, and go to the **Member Of** tab. On the **Member Of** tab, select groups from the list and click **Remove**.

For detailed instructions on how to remove computer accounts from a group, see **ActiveRoles Server/How To/Manage Computer Accounts/Remove a computer account from a group** in ActiveRoles Server Help.

Moving Computer Accounts

To move computer accounts to another container, select the computer accounts, right-click the selection, and click **Move**. In the **Move** dialog box, select the container to which you want to move the accounts.



MMC 2.0 provides the drag-and-drop option for moving objects. To move an object, drag the object from the details pane to a destination container in the console tree.

For detailed instructions on how to move computer accounts, see **ActiveRoles Server/How To/Manage Computer Accounts/Move a computer account** in ActiveRoles Server Help.

Importing Computer Accounts

To import a computer account, right-click a container or an Organizational Unit where you want to save an imported computer account, and then click **Import**. In the **Import Directory Objects** dialog box, select an .xml file, and click **Open**. The computer account from the file will be saved in the selected container or Organizational Unit.

For detailed instructions on how to import a computer account, see **ActiveRoles Server/How To/Manage Computer Accounts/Import a computer account** in ActiveRoles Server Help.

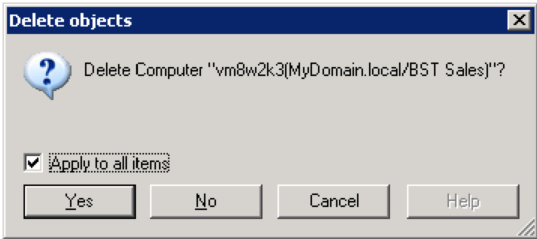
Exporting Computer Accounts

To export a computer account, right-click that computer account, point to **All Tasks,** and then click **Export**. In the open dialog box, select a folder where to save the exported computer account, enter a file name in the **File name** box, and click **Save**. The computer account will be saved to the .xml file.

For detailed instructions on how to export a computer account, see **ActiveRoles Server/How To/Manage Computer Accounts/Export a computer account** in ActiveRoles Server Help.

Deleting Computer Accounts

To delete a computer account, select the computer account, right-click the selection, and then click **Delete**. In the open dialog box, click **Yes**. If you delete several computer accounts, then the **Delete objects** dialog box appears. In the dialog box, select the **Apply to all items** check box, and then click **Yes**.



Note that deleting a computer account is an irreversible operation. A new computer account with the same name as a deleted account cannot authenticate in the domain unless the administrator re-joins the computer to the domain. For this reason, it is recommended that you disable rather than delete computer accounts.

For detailed instructions on how to delete computer accounts, see **ActiveRoles Server/How To/Manage Computer Accounts/Delete a computer account** in ActiveRoles Server Help.

6

Organizational Unit Management

- Introduction
- Creating an Organizational Unit
- Finding an Organizational Unit
- Modifying Organizational Unit Properties
- Renaming an Organizational Unit
- Moving an Organizational Unit
- Importing Organizational Units
- Exporting Organizational Units
- Deleting an Organizational Unit

Introduction

Organizational Units (OUs) are containers in Active Directory. OUs can contain user accounts, groups, computer accounts, and other OUs. An object can be included in only one OU.

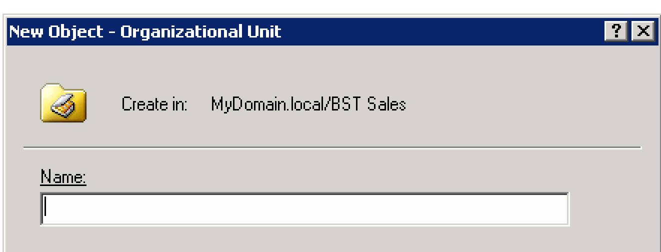
When you expand the **Active Directory** branch in the MMC Interface, the console tree displays icons representing domains. Double-click a domain icon to see containers that are defined in the domain. OUs are marked with the  icon.

When you select an OU in the console tree, the details pane lists objects included in that OU, and the **Action** menu provides commands to create new objects in the OU, search for objects in the OU, and manage OU properties.

The following sections guide you through the MMC Interface to manage Organizational Units. You can also perform these tasks using the Web Interface.

Creating an Organizational Unit

To create an OU: in the console tree, right-click the domain or another OU, point to **New**, and click **Organizational Unit**. Type the name of the new OU and click **OK**.



For detailed instructions on how to create Organizational Units, see **ActiveRoles Server/How To/Manage Organizational Units/Create an Organizational Unit** in ActiveRoles Server Help.

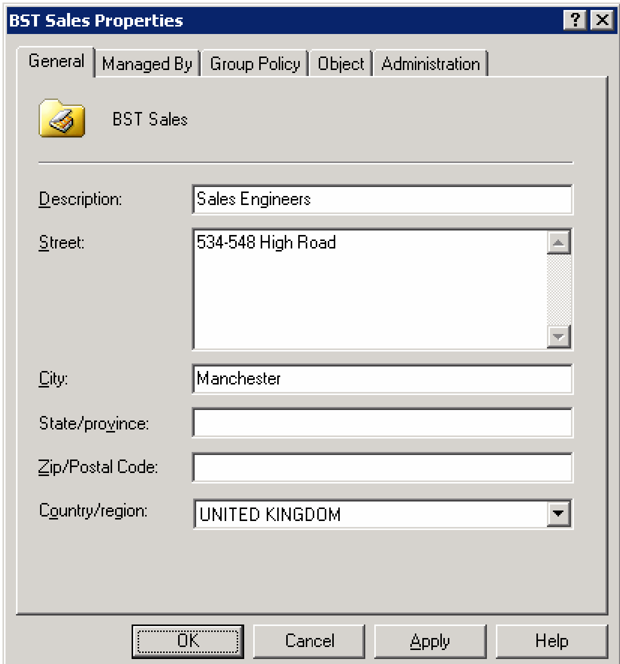
Finding an Organizational Unit

To find an Organizational Unit, select the domain you want to search, and click on the toolbar, or click **Find** on the **Action** menu. In the **Find** window, select **Organizational Units** from the **Find** list, specify your search criteria, and start the search. In the search results list, right-click Organizational Units and use commands on the shortcut menu to perform management activities. For more information, see "Find Objects" earlier in this document.

For detailed instructions on how to search for Organizational Units, see **ActiveRoles Server/How To/Manage Organizational Units/Find an Organizational Unit** in ActiveRoles Server Help.

Modifying Organizational Unit Properties

To modify the properties of an OU, right-click the OU, and then click **Properties**. You can make changes to the OU properties using the **Properties** dialog box.



In the **Properties** dialog box, some property labels may be displayed as hyperlinks. The hyperlink indicates that ActiveRoles Server enforces certain policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see "Policy Information" earlier in this document).

The policy information is also displayed whenever the inputted property value violates a policy restriction. Property changes cannot be applied unless you enter an acceptable value.

To modify the advanced properties of a OU, right-click the account, point to **All Tasks**, and then click **Advanced Properties**; or right-click the OU, click **Properties** on the shortcut menu and on the **Object** tab, click **Advanced Properties**.

For detailed instructions on how to modify Organizational Unit properties, see **ActiveRoles Server/How To/Manage Organizational Units/Modify Organizational Unit properties** in ActiveRoles Server Help.

Renaming an Organizational Unit

To rename an OU, right-click the OU, and then click **Rename**. Type the new name and press ENTER.

For detailed instructions on how to rename Organizational Units, see **ActiveRoles Server/How To/Manage Organizational Units/Rename an Organizational Unit** in ActiveRoles Server Help.

Moving an Organizational Unit

To move an OU, right-click the OU and click **Move**. In the **Move** dialog box, select the container to which you want to move the OU.

For detailed instructions on how to move Organizational Units, see **ActiveRoles Server/How To/Manage Organizational Units/Move an Organizational Unit** in ActiveRoles Server Help.

Importing Organizational Units

To import an Organizational Unit, right-click a folder where you want to save an imported Organizational Unit, and then click **Import**. In the **Import Directory Objects** dialog box, select an .xml file, and click **Open**. The Organizational Unit from the file will be saved in the selected folder.

For detailed instructions on how to import an Organizational Unit, see **ActiveRoles Server/How To/Manage Organizational Units/Import an Organizational Unit** in ActiveRoles Server Help.

Exporting Organizational Units

To export an Organizational Unit, right-click that Organizational Unit, point to **All Tasks,** and then click **Export**. In the open dialog box, select a folder where to save the exported Organizational Unit, enter a file name in the **File name** box, and click **Save**. The Organizational Unit will be saved to the .xml file.

For detailed instructions on how to export an Organizational Unit, see **ActiveRoles Server/How To/Manage Organizational Units/Export a Organizational Unit** in ActiveRoles Server Help.

Deleting an Organizational Unit

To delete an OU, right-click the OU, and click **Delete**. If you delete an OU which contains objects, then the **Delete objects** dialog box appears. In the dialog box, select the **Apply to all items** check box, and then click **Yes**.

For detailed instructions on how to delete Organizational Units, see **ActiveRoles Server/How To/Manage Organizational Units/Delete an Organizational Unit** in ActiveRoles Server Help.

7

Contact Management

- Introduction
- Creating a Contact
- Finding a Contact
- Modifying Contact Properties
- Renaming a Contact
- Adding and Removing a Contact from Groups
- Performing Exchange Tasks on a Contact
- Moving Contacts

- Importing Contacts
- Exporting Contacts
- Deleting Contacts

Introduction

A contact is an Active Directory object that holds e-mail and telephone information about an individual, without giving that person a security account on the network.

Contacts do not have a security identifier, unlike user accounts and groups. Contacts are used to add members to distribution lists or groups without granting them access to network resources.

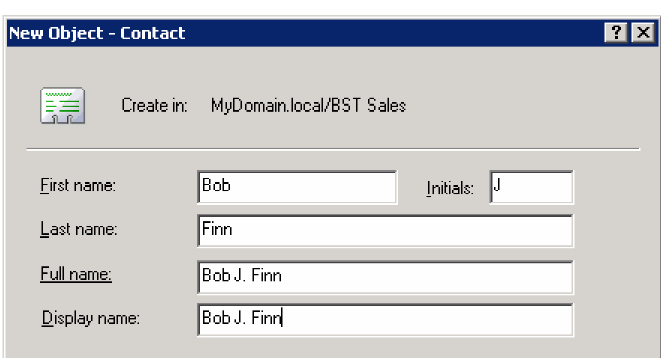
ActiveRoles Server allows you to create, modify, and delete contacts. ActiveRoles Server also supports Exchange tasks, such as establishing email addresses for contacts.

The following sections explain how to use the MMC Interface to manage contacts. You can also perform these tasks via the Web Interface.

Creating a Contact

To create a new contact: in the console tree, right-click the container where you want to add the contact, point to **New**, click **Contact**, and follow the instructions in the wizard.

In the wizard, some property labels may be displayed as hyperlinks. For example, in the screen below, **Full name** is a hyperlink, indicating that ActiveRoles Server enforces certain policy restrictions on this property. To view details about the policy, click the hyperlink: the policy information is displayed (see “Policy Information” earlier in this document).



The policy information is also displayed whenever the inputted property value violates a policy restriction. The wizard cannot proceed unless you enter an acceptable value.

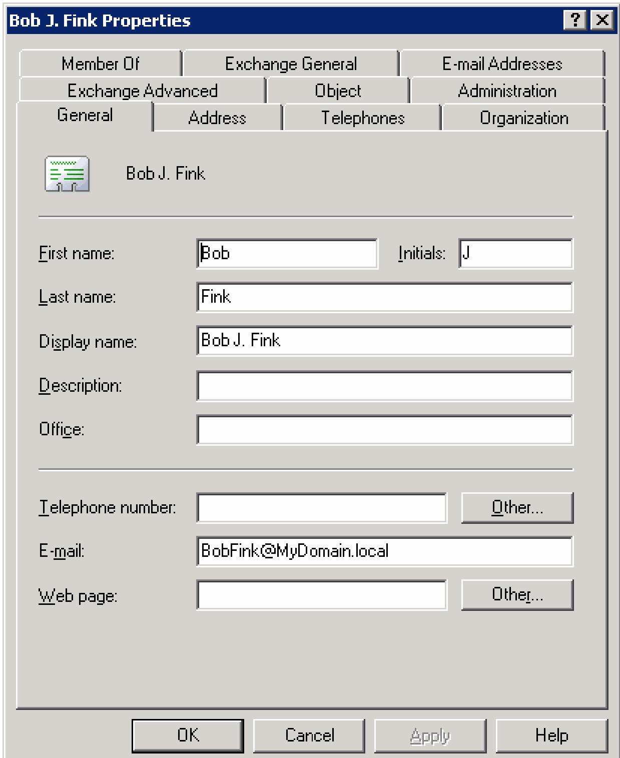
For detailed instructions on how to create contacts, see **ActiveRoles Server/ How To/Manage Contacts/Create a contact** in ActiveRoles Server Help.

Finding a Contact

To find a contact, select the container you want to search, and click  on the toolbar, or click **Find** on the **Action** menu. In the **Find** window, select **Contacts** from the **Find** list, specify your search criteria, and start the search. In the search results list, right-click contacts and use commands on the shortcut menu to perform management activities. For more information, see "Find Objects" earlier in this document.

Modifying Contact Properties

To modify contact properties, right-click the contact, and then click **Properties**. You can make changes to contact properties using the **Properties** dialog box.



In the **Properties** dialog box, some property labels may be displayed as hyperlinks. The hyperlink indicates that ActiveRoles Server enforces policy restrictions on the property. To view details about the policy, click the hyperlink: the policy information is displayed (see "Policy Information" earlier in this document).

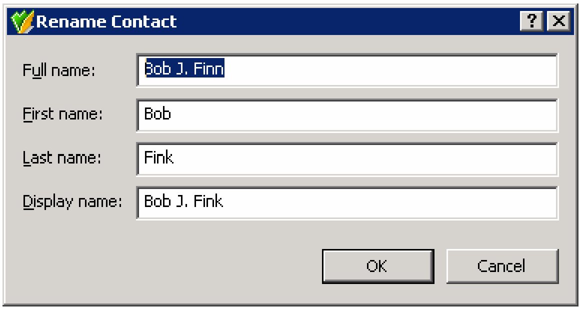
The policy information is also displayed whenever an inputted property value violates a policy restriction. Property changes cannot be applied unless you enter an acceptable value.

The MMC Interface allows you to select multiple contacts, and then modify the properties of all selected contacts via a single dialog box.

To modify a contact's advanced properties, right-click the contact, point to **All Tasks**, and then click **Advanced Properties**; or right-click the contact, click **Properties** on the shortcut menu and on the **Object** tab, click **Advanced Properties**.

Renaming a Contact

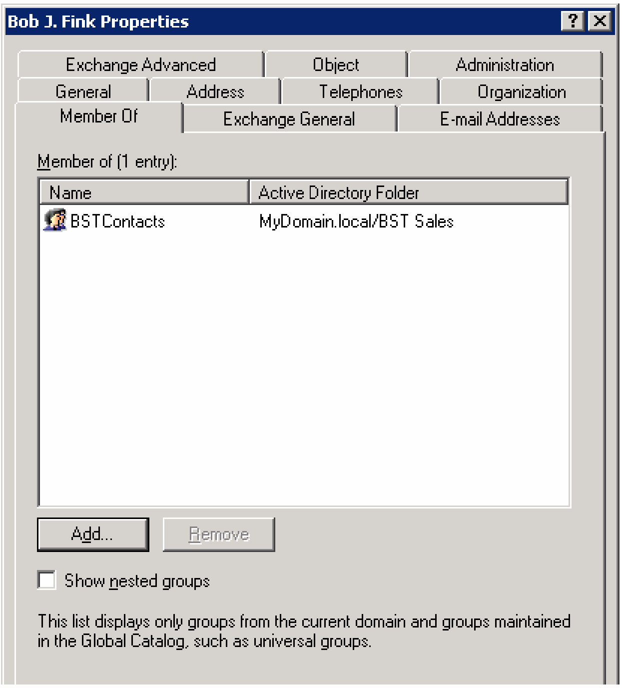
To rename a contact, right-click the contact, and then click **Rename**. Type a new name and press ENTER. In the **Rename Contact** dialog box, you can change the contact's first name, last name, and display name.



Adding and Removing a Contact from Groups

To add a contact to groups, right-click the contact and click **Add to a group**. In the **Select Objects** dialog box, you can select groups from the list or type group names. Use the **Check Names** button to verify the names that you type. If ActiveRoles Server cannot find a group, it prompts you to correct the name.

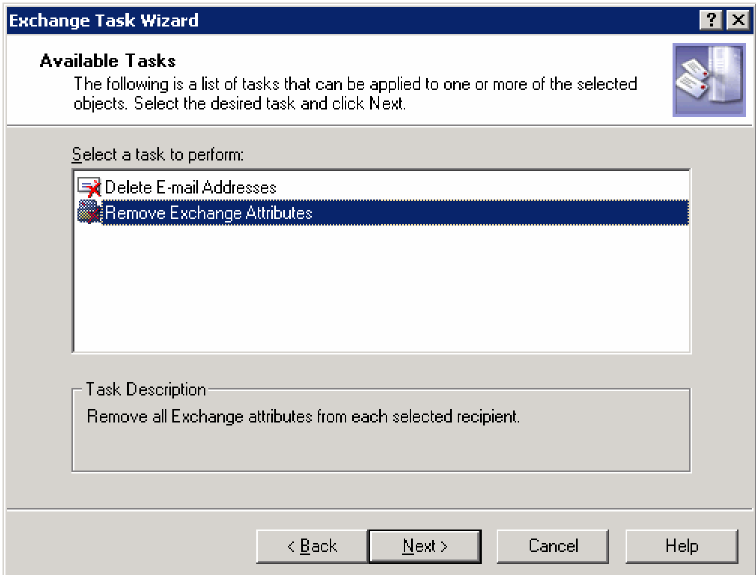
You can add and remove a contact from groups by modifying the group membership list on the **Member Of** tab in the **Properties** dialog box. To display the **Properties** dialog box, right-click the contact, and then click **Properties**.



Performing Exchange Tasks on a Contact

To perform Exchange tasks on a contact, right-click the contact, click **Exchange Tasks**, and follow the instructions in the Exchange Task Wizard.

The Exchange Task Wizard helps you manage Exchange 2000/2003 recipients by providing a set of tasks that apply to the selected contact.



For additional information, see “Exchange Tasks on Contacts,” later in this document.

Moving Contacts

To move contacts to another container, select the contacts, right-click the selection, and click **Move**. In the **Move** dialog box, select the container to which you want to move the contacts.

MMC 2.0 provides the drag-and-drop option for moving objects. To move an object, drag the object from the details pane to a destination container in the console tree.

Importing Contacts

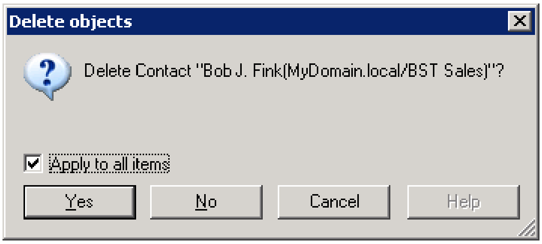
To import a contact, right-click a container or an Organizational Unit where you want to save an imported contact, and then click **Import**. In the **Import Directory Objects** dialog box, select an .xml file, and click **Open**. The contact from the file will be saved in the selected container or Organizational Unit.

Exporting Contacts

To export a contact, right-click that contact, point to **All Tasks,** and then click **Export**. In the open dialog box, select a folder where to save the exported contact, enter a file name in the **File name** box, and click **Save**. The contact will be saved to the .xml file.

Deleting Contacts

To delete a contact, select the contact, right-click the selection, and then click **Delete**. In the open dialog box, click **Yes**. If you delete several contacts, then the **Delete objects** dialog box appears. In the dialog box, select the **Apply to all items** check box, and then click **Yes**.



Note that deleting a contact is an irreversible operation. A new contact with the same name as a deleted contact does not automatically assume the same membership of distribution and security groups that the deleted contact had.

8

Exchange Recipients Management

- Introduction
- Exchange Tasks on User Accounts
- Exchange Tasks on Groups
- Exchange Tasks on Contacts
- Managing Exchange Properties
- Managing Exchange 5.5

Introduction

In the managed domains with Exchange 2000 and Exchange 2003, ActiveRoles Server provides the ability to perform Exchange tasks and manage Exchange-related properties.

The Exchange Task Wizard allows you to perform the following tasks on users, groups, and contacts:

- Create and delete user mailboxes.
- Establish external e-mail addresses for users, contacts, and groups.
- Delete external e-mail addresses for users, contacts, and groups.
- Move user mailboxes to a different server or mailbox store.
- Hide and unhide the membership of groups.
- Remove all Exchange settings (advanced, disaster-recovery task).

For disaster recovery, the Exchange Tasks Wizard offers the task **Remove Exchange Attributes**. This task removes all Exchange settings from the selected recipient objects (users, groups, or contacts). It should be used only under very specific circumstances. When you remove all Exchange attributes from a recipient object, the recipient can no longer send or receive mail, and will not appear in any address lists, including the Global Address List.

The following sections briefly describe the other Exchange tasks available on user accounts, groups, and contacts.

Exchange Tasks on User Accounts

To perform Exchange tasks on user accounts, select one or more accounts, right-click the selection, click **Exchange Tasks**, and then follow the instructions in the wizard.

Depending on the selected accounts, the following tasks are available in the wizard.

- Account is neither mailbox-enabled nor mail-enabled:
    - Create Mailbox
    - Establish E-Mail Addresses
    - Remove Exchange Attributes

- Account is mailbox-enabled (the user has a mailbox on Exchange 2000 server):
    - Delete Mailbox
    - Move Mailbox
    - Remove Exchange Attributes
- Account is mail-enabled (has e-mail addresses established):
    - Delete E-Mail Addresses
    - Remove Exchange Attributes

For detailed instructions on how to perform Exchange tasks on user accounts, see **ActiveRoles Server/How To/Manage Exchange 2000/2003 and Exchange 5.5/ Perform Exchange tasks on user accounts** in ActiveRoles Server Help.

Exchange Tasks on Groups

To perform Exchange tasks on groups, select one or more groups, right-click the selection, click **Exchange Tasks**, and then follow the instructions of the wizard.

In the wizard, the following tasks are available for groups:

- **Establish an E-Mail Address**—Establish an e-mail address for each selected group to configure it as a distribution list.
- **Delete E-Mail Addresses**—Delete e-mail addresses for each selected group so that the group can no longer be used as a distribution list.
- **Hide Membership**—Prevent viewing the membership of each selected group.
- **Unhide Membership**—Allow viewing the membership of each selected group.
- **Remove Exchange Attributes** – Remove all Exchange attributes from each selected recipient.

For detailed instructions on how to perform Exchange tasks on groups, see **ActiveRoles Server/How To/ Manage Exchange 2000/2003 and Exchange 5.5/Perform Exchange tasks on groups** in ActiveRoles Server Help.

Exchange Tasks on Contacts

To perform Exchange tasks on contacts, select one or more contacts, right-click the selection, click **Exchange Tasks**, and then follow the instructions in the wizard.

In the wizard, the following tasks are available for contacts:

- **Establish E-Mail Addresses**—Establish an external e-mail address for each selected contact.
- **Delete E-Mail Addresses**—Delete external e-mail addresses for each selected contact.
- **Remove Exchange Attributes** – Remove all Exchange attributes from each selected recipient.

For detailed instructions on how to perform Exchange tasks on contacts, see **ActiveRoles Server/How To/ Manage Exchange 2000/2003 and Exchange 5.5/ Perform Exchange Tasks on contacts** in ActiveRoles Server Help.

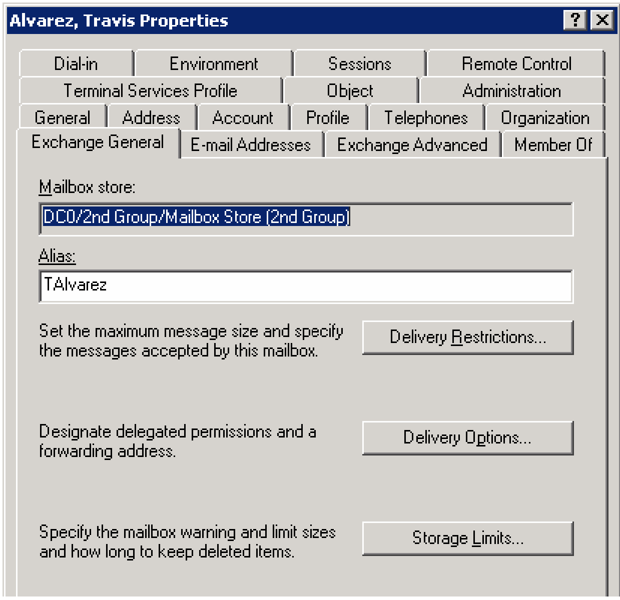
Managing Exchange Properties

For Exchange 2000/2003 recipients (mail-enabled users, contacts and groups, and mailbox-enabled users) the **Properties** dialog box includes the following tabs for management of Exchange 2000 related properties:

- Exchange General
- E-mail Addresses
- Exchange Advanced

Exchange General Tab

For a mailbox-enabled user, the **Exchange General** tab is used to set delivery restrictions, delivery options, and storage limits. Also you can view Mailbox store and view or modify user’s alias.



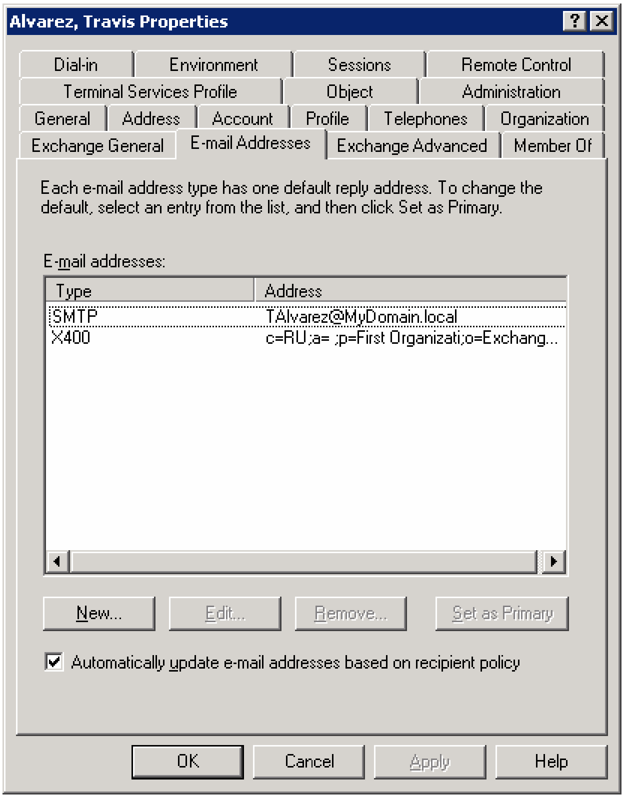
- **Delivery Restrictions**—Used to specify the maximum size of incoming and outgoing messages for the mailbox-enabled user, and to specify from whom the mailbox-enabled user can or cannot receive e-mail:
- **Delivery Options**—Used to allow one or more users to send messages on behalf of the mailbox-enabled user, to specify a forwarding address for messages addressed to the mailbox-enabled user, and to limit the number of recipients to whom the mailbox-enabled user can send a message.
- **Storage Limits**—Used to specify the mailbox storage limits. These limits are used to warn, or prohibit a mailbox-enabled user from sending or receiving e-mail, and to specify the number of days a deleted item is stored in the mailbox store before it is permanently deleted.

For a mail-enabled contact, the **Exchange General** tab is used to view or modify the contact's alias, and established e-mail address, specify a message size limit, and set delivery restrictions.

For a mail-enabled group, the **Exchange General** tab is used to view or modify the group's alias, and its display name, specify a message size limit, and set delivery restrictions.

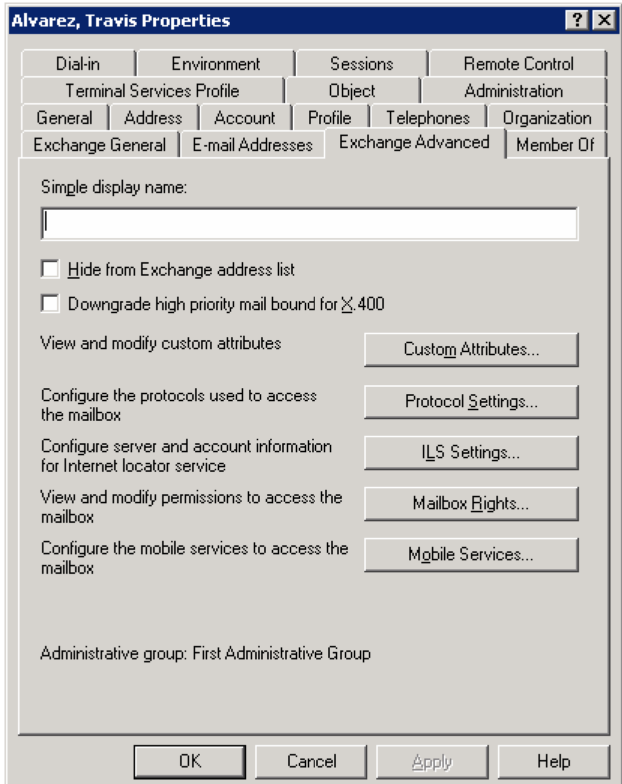
E-mail Addresses Tab

For a mailbox-enabled user or a mail-enabled recipient, the **E-Mail Addresses** tab is used to view, add, modify, and remove e-mail addresses. You can also use this tab to select a primary address when you have two or more addresses of the same address type.



Exchange Advanced Tab

For a mailbox-enabled user, the **Exchange Advanced** tab is used to assign custom attributes, select protocol settings, select Internet Locator Service (ILS) settings, manage mailbox rights, and manage mobile services.



- **Custom Attributes**—Used to assign values to Exchange 2000 custom attributes. Exchange 2000 provides 15 custom attributes.
- **Protocol Settings**—Used to enable or disable protocols for the mailbox-enabled users. Available protocols include Hypertext Transfer Protocol (HTTP), Internet Message Access Protocol version 4 (IMAP4), and Post Office Protocol version 3 (POP3).
- **ILS Settings**—Used to specify the Internet Locator Service (ILS) server and ILS account name for the mailbox-enabled user.
- **Mailbox Rights**—Used to view and change mailbox permissions, assign mailbox permissions to users and groups, and change inherited permissions.
- **Mobile Services**—Used to enable Mobile Services for Exchange. ActiveRoles Server now supports this new feature, introduced in Exchange Server 2003. Using any mobile device with a mobile browser a user can get access to personal Exchange Information.

For a mailbox-enabled contact, the **Exchange Advanced** tab is used to assign custom attributes, and select Internet Locator Service (ILS) settings.

For a mailbox-enabled group, the **Exchange Advanced** tab is used to assign custom attributes. Also you can specify whether to send message delivery report and to whom, or do not send it.

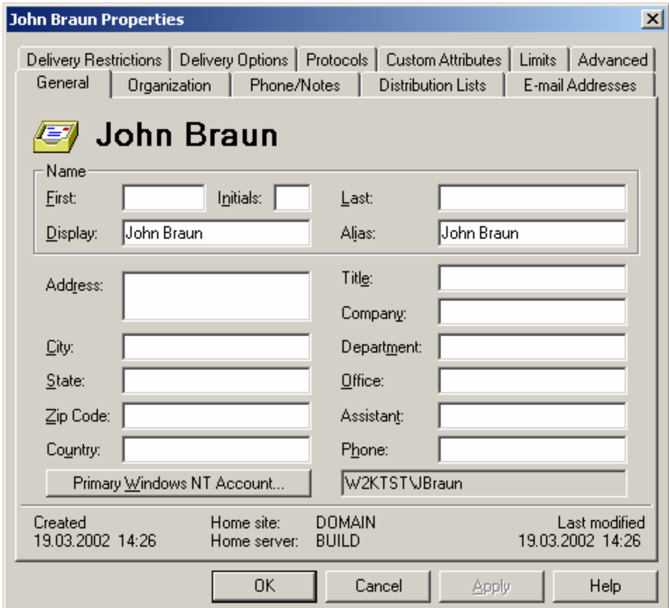
Managing Exchange 5.5

If the Microsoft Exchange Server 5.5 Administrator is installed on your computer, you can view and modify Exchange 5.5-related user properties with the ActiveRoles Server snap-in.

The ActiveRoles Server snap-in allows you to view and modify the properties of mailboxes on Exchange 5.5 servers. To access Exchange 5.5 directory services, the ActiveRoles Server snap-in employs the User Manager Extension (UME), which is part of the Microsoft Exchange Server Administrator.

When accessing the Exchange server through UME, access permissions are validated by the Exchange Server. For this reason, the Exchange Server Administrator tool should be used to specify permissions for the management of Exchange 5.5-related properties with the ActiveRoles Server snap-in.

If you have Microsoft Exchange Server Administrator installed on your computer, the **Legacy Exchange Properties** command appears on the **Action** menu when you select a user account in the ActiveRoles Server snap-in. The **Legacy Exchange Properties** command displays the dialog box for editing the properties of the Exchange 5.5 mailbox associated with the selected user account. The **Properties** dialog box is shown below.



In this dialog box, you can modify mailbox properties by selecting tabs and typing new values in the property boxes.

You must have sufficient administrative rights to the Exchange 5.5 Server to view and modify Exchange mailbox properties.

For detailed instructions on how to manage Exchange 5.5-related properties, see **ActiveRoles Server/How To/Manage Exchange 2000/2003 and Exchange 5.5/ Managing Exchange 5.5-Related user properties** in ActiveRoles Server Help.

For more information about managing Exchange 5.5 mailboxes, refer to Microsoft Exchange Server Administrator Help.